

Appointment

From: Allen, Reginald [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=799C3B0558E14130B17C66B2533548BA-ALLEN, REGI]
Sent: 2/28/2018 8:58:13 PM
To: Allen, Reginald [/o=ExchangeLabs/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=799c3b0558e14130b17c66b2533548ba-Allen, Regi]; Richardson, RobinH [/o=ExchangeLabs/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=2fa5c9eb65dc497c81a8dc9ccdb1ffa7-Richardson, RobinH]; Grantham, Nancy [/o=ExchangeLabs/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=12a3c2ed7158417fb0bb1b1b72a8cfb0-Grantham, Nancy]
Subject: Discussion on PRA for Mike Flynn
Attachments: 2017 Org Assessments.pdf
Location: Robin's Office
Start: 3/1/2018 6:00:00 PM
End: 3/1/2018 7:00:00 PM
Show Time As: Busy
Importance: High

Discussion on input to Mike Flynn's PRA – he does not know yet...

Appointment

From: Allen, Reginald [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=799C3B0558E14130B17C66B2533548BA-ALLEN, REGI]
Sent: 11/21/2017 11:33:35 PM
To: Allen, Reginald [/o=ExchangeLabs/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=799c3b0558e14130b17c66b2533548ba-Allen, Regi]; McCluney, Lance [/o=ExchangeLabs/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=c07ebdcfaa8949bcaf150c7bd6489f5c-LMCCLUNE]; Lesperance, Twanna [/o=ExchangeLabs/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=0e84ab860e2d40dca5087448fc2621eb-Terrell, Twanna]
Subject: Pending Requirements Discussion
Attachments: AO FTE Management and Staffing Requirements
Location: Office
Start: 11/22/2017 3:00:00 PM
End: 11/22/2017 3:30:00 PM
Show Time As: Busy

Call my number when the two of you are in a room ready to start – this is to discuss the attached requirement

Reggie

Message

From: Allen, Reginald [Allen.Reginald@epa.gov]
Sent: 11/21/2017 12:19:07 AM
To: Allen, Reginald [Allen.Reginald@epa.gov]; Bailey, KevinJ [Bailey.KevinJ@epa.gov]; Benjamin-Sirmons, Denise [Benjamin-Sirmons.Denise@epa.gov]; Brennan, Thomas [Brennan.Thomas@epa.gov]; Campbell, Jennie [Campbell.Jennie@epa.gov]; Caraballo, Mario [Caraballo.Mario@epa.gov]; Etzel, Ruth [Etzel.Ruth@epa.gov]; Grantham, Nancy [Grantham.Nancy@epa.gov]; Hope, Brian [Hope.Brian@epa.gov]; Johnston, Khanna [Johnston.Khanna@epa.gov]; Lawrence, Tanya [Lawrence.Tanya@epa.gov]; Lesperance, Twanna [Lesperance.Twanna@epa.gov]; McCluney, Lance [McCluney.Lance@epa.gov]; Reed, Khesha [Reed.Khesha@epa.gov]; Richardson, RobinH [Richardson.RobinH@epa.gov]; Rogers, JoanB [Rogers.JoanB@epa.gov]; Torres, Ramon [Torres.Ramon@epa.gov]; White, Elizabeth [white.elizabeth@epa.gov]; Wooden-Aguilar, Helena [Wooden-Aguilar.Helena@epa.gov]; Zarba, Christopher [Zarba.Christopher@epa.gov]; Kime, Robin [Kime.Robin@epa.gov]
CC: Fraser, Scott [Fraser.Scott@epa.gov]; Eng, Connie [Eng.Connie@epa.gov]
Subject: AO FTE Management and Staffing Requirements
Attachments: Managing FTE Levels Templatefinal draft.docx; Managing our FTE - process rev.docx; AO PROPOSED STAFFING NEEDS .xlsx

Importance: High

Teammates

Attached, for your action are three requirements that are needed from you to inform AOs response to agency level taskings that are due from us next Tuesday.

The first requirement is filling out the Managing FTE levels template (attached) that you have seen before – we are now asking that you answer the questions for your office and return the completed sheet not later than **noon Monday the 27th of Nov 2017**. This is absolutely the maximum amount of time we can provide as we must take input from every office and produce a consolidated AO document by the next morning. If you can provide it earlier that would be great as we will have less than 24 hours to turn it. The second attachment is governance principles from Mike Flynn.

The second requirement is providing information on **your hiring planning and pending hires / actions**. Please fill out the attached spreadsheet with the required information as listed in the columns and per the example on the 1st entry on the sheet. The purpose of this sheet is to ensure that we have identified all your requirements, understand your priorities within your hiring actions, (you must prioritize) and understand your justifications as we move forward in developing our AO wide plan to address projected FTE cuts. Again we need your completed sheet not later than **noon Monday the 27th of Nov 2017 for the same reason as above. Some additional spreadsheet info below signature block.**

Finally the third action that is required was directed by the Chief of Staff asking that each staff office provide their planned travel events / expenditures for the remainder of this year and the first quarter of next year by the end of this week. Please provide to us by **noon Friday the 24th of Nov 2017** with the Event, Purpose, Date, Location, Attendees and estimated cost of the travel and we will combine for Helena and Ryan.

Please let me or Twanna know if you have any questions or concerns and apologizes for the holiday short suspenses but they could not be avoided.

Best
Reggie

*Reginald E. Allen, SES
Assistant Deputy Chief of Staff
U.S. Environmental Protection Agency
Office 202-564-0444
Direct 202-564-1029*

Additional Spreadsheet Details

The columns in the spreadsheet are self-explanatory but for column J see below:

To help determine AO's best approach to developing a reasonable strategy, you will need to categorize each of your potential actions. **The assigned levels in the "PRIORITY CATEGORY " column are:**

1. Non-Career Appointment
2. Administrator's Priorities
3. Mandated by law or agency requirement
4. Supervisor/Manager
5. Detail with NTE term(s)
6. Other

This information will be communicated to the SCC – RTP and ERD as well as your assigned analyst. To minimize the telephone calls and interruptions to RTP, we are asking that you pause on contacting RTP unless you are responding to their request for information. I have from their senior manager that the number of telephones calls from AO is one of the biggest hindrances in moving our actions and only results into a much slower process. In other words, we believe the work will be better managed if RTP can control the process by reaching out to you as needed. As part of tracking process, RTP has agreed to keep your assign analyst in all communication; therefore, your assigned analysts have been asked to provide you with daily updates.

We also want to continue to encourage offices to consider using career development programs, Talent Hub announcements, Skill Marketplace Projects, volunteers, etc. when identifying ways to meet your current needs.

If you have questions about this message, please contact your assigned analysts, Twanna, or me for assistance. We appreciate your patience and look forward to identifying strategies to meet AO's needs and to do our part to support the Agency-wide goals.

Message

From: Wooden-Aguilar, Helena [Wooden-Aguilar.Helena@epa.gov]
Sent: 12/8/2017 11:50:58 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]
CC: Lesperance, Twanna [Lesperance.Twanna@epa.gov]; McCluney, Lance [McCluney.Lance@epa.gov]; Cortes, Emilio [Cortes.Emilio@epa.gov]; Wooden-Aguilar, Helena [Wooden-Aguilar.Helena@epa.gov]
Subject: Re: Revised Strategic Hiring Plan and Priorities
Attachments: attachment 1.docx; ATT00001.htm

Message

From: Lesperance, Twanna [Lesperance.Twanna@epa.gov]
Sent: 12/8/2017 11:32:07 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]
Subject: Fwd: Revised Strategic Hiring Plan and Priorities
Attachments: AO - Managing FTE Levels (Revised 12-8-17).docx; ATT00001.htm

Ex. 5 - Deliberative Process

Respectfully,
Twanna

Begin forwarded message:

From: "Wooden-Aguilar, Helena" <Wooden-Aguilar.Helena@epa.gov>
Date: December 8, 2017 at 12:32 PM EST
To: "Allen, Reginald" <Allen.Reginald@epa.gov>
Cc: "Lesperance, Twanna" <Lesperance.Twanna@epa.gov>, "McCluney, Lance" <McCluney.Lance@epa.gov>, "Cortes, Emilio" <Cortes.Emilio@epa.gov>
Subject: Revised Strategic Hiring Plan and Priorities

Attached is where I ended up for the strategy and the hiring.

My decisions were as following on the hiring. Please note that there are 5 below. I will revisit the other remaining external priorities that folks have put forth but I think we have a big hill to climb going through the panel.

Thank you all for your help and I will plan a meeting for Monday to go through the other reassignments, details, and actions that SSC is hold until COB Monday.

Helena

OFFICE	RECRUITS and JUSTIFICATION
OAES:	Ex. 5 - Deliberative Process
OCR:	
OCIR:	

	<h1>Ex. 5 - Deliberative Process</h1>
OPA:	
<i>*Awaiting pending external hiring report from OP</i>	

Helena Wooden-Aguilar
Acting Deputy Chief of Staff
Office of the Administrator
US Environmental Protection Agency
202-564-0792 (office)

Ex. 6

 (mobile)
wooden-aguilar.helena@epa.gov

Message

From: Lesperance, Twanna [Lesperance.Twanna@epa.gov]
Sent: 12/7/2017 10:11:17 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]
Subject: AO - Managing FTE Levels (Revised 12-5-17) RR.docx
Attachments: AO - Managing FTE Levels (Revised 12-5-17) RR.docx

Here you go, I hope this works. Thanks. TL

Message

From: Richardson, RobinH [Richardson.RobinH@epa.gov]
Sent: 12/7/2017 7:32:15 PM
To: Lesperance, Twanna [Lesperance.Twanna@epa.gov]; Wooden-Aguilar, Helena [Wooden-Aguilar.Helena@epa.gov]
CC: Bailey, KevinJ [Bailey.KevinJ@epa.gov]; Allen, Reginald [Allen.Reginald@epa.gov]
Subject: RE: Proposed Approach to Managing AO FTE Levels - UPDATED AO PROPOSED STAFFING CHART
Attachments: AO - Managing FTE Levels (Revised 12-5-17) RR.docx

Hi Twanna –

Thank you for your patience! Attached are some suggestions and thoughts. I'm happy to discuss further just let me know.

Thank you again! Robin

Robin H Richardson
Principal Deputy Associate Administrator
Office of Congressional and Intergovernmental Relations
U.S. Environmental Protection Agency
202-564-3358 (desk)
Ex. 6 (cell)
richardson.robinh@epa.gov

From: Lesperance, Twanna
Sent: Thursday, December 07, 2017 1:48 PM
To: Richardson, RobinH <Richardson.RobinH@epa.gov>; Wooden-Aguilar, Helena <Wooden-Aguilar.Helena@epa.gov>
Cc: Bailey, KevinJ <Bailey.KevinJ@epa.gov>; Allen, Reginald <Allen.Reginald@epa.gov>
Subject: RE: Proposed Approach to Managing AO FTE Levels - UPDATED AO PROPOSED STAFFING CHART

Hello Robin,

I am checking in to see if you had a chance to add your comments? The goal is to give to Helena the proper time to review and address all questions before it becomes final.

Thanks,
Twanna

Twanna Lesperance, Assistant Director, AMS, PMO
Office of Administrative and Executive Services
Office of the Administrator, EPA
202-564-0419 (Desk)
lesperance.twanna@epa.gov

From: Richardson, RobinH
Sent: Thursday, December 07, 2017 8:16 AM
To: Wooden-Aguilar, Helena <Wooden-Aguilar.Helena@epa.gov>
Cc: Bailey, KevinJ <Bailey.KevinJ@epa.gov>; Lesperance, Twanna <Lesperance.Twanna@epa.gov>
Subject: Re: Proposed Approach to Managing AO FTE Levels - UPDATED AO PROPOSED STAFFING CHART

Thank you Helena! I do have some suggestions I'll incorporate into the straw. Thanks again! Robin

Robin H Richardson
PDAA/OCIR
202-564-3358 (desk)
Ex. 6 (cell)
richardson.robinh@epa.gov

On Dec 7, 2017, at 8:07 AM, Wooden-Aguilar, Helena <Wooden-Aguilar.Helena@epa.gov> wrote:

Thank you Twanna.

Gentle reminder if folks have edits/comments please send to Twanna and Reggie by today. I have to send to OARM tomorrow. Thx

Helena

Helena Wooden-Aguilar
Acting Deputy Chief of Staff
Office of the Administrator
U.S. Environmental Protection Agency
202-564-0792 (office)
Ex. 6 (mobile)
wooden-aguilar.helena@epa.gov

On Nov 29, 2017, at 7:40 PM, Lesperance, Twanna <Lesperance.Twanna@epa.gov> wrote:

All,

I have updated the AO Proposed Staffing Chart to include new proposed hire for OPA's. It was inadvertently omitted from the earlier chart shared in Reggie's not on Tuesday, November 28, 2017.

Thanks,
Twanna

*Twanna Lesperance, Assistant Director, AMS, PMO
Office of Administrative and Executive Services
Office of the Administrator, EPA
202-564-0419 (Desk)
lesperance.twanna@epa.gov*

From: Allen, Reginald
Sent: Tuesday, November 28, 2017 6:37 PM
Subject: Proposed Approach to Managing AO FTE Levels

Teammates

In the interest of full transparency and to help the discussion on Thursday Helena wanted to make sure you have all the submission we have received to date.

Please find attached the following documents

- AO Managing FTE levels – current draft
- AO Proposed Staffing Spreadsheet – working document from the input we received from you – if you have updates please send them.
- Summary of Impacts from the Offices
- Office submissions

Best
Reggie

Reginald E. Allen, SES
Assistant Deputy Chief of Staff
U.S. Environmental Protection Agency
Office 202-564-0444
Direct 202-564-1029
 Cell:

Ex. 6

<OCHP - FTE LEVELS.docx>
 <OCIR - FTE LEVELS.docx>
 <OCR - FTE LEVELS.docx>
 <OEX - FTE LEVELS.docx>
 <OHS - FTE LEVEL.docx>
 <OPA - FTE LEVELS.docx>
 <OPEEE - FTE LEVELS.docx>
 <OSDBU - FTE LEVELS .docx>
 <SAB - FTE LEVELS.docx>
 <Summary of Impacts of reduced FTE levels.docx>
 <AO PROPOSED STAFFING NEEDS - MASTER.xlsx>
 <OAES - FTE Levels.docx>
 <AO - Managing FTE Levels.docx>

Message

From: Reed, Khesha [Reed.Khesha@epa.gov]
Sent: 12/7/2017 4:24:48 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]
CC: McCluney, Lance [McCluney.Lance@epa.gov]; Etzel, Ruth [Etzel.Ruth@epa.gov]; Lesperance, Twanna [Lesperance.Twanna@epa.gov]
Subject: RE: AO - Managing FTE Levels (Revised 12-5-17).docx
Attachments: AO - Managing FTE Levels OCHP 12-7-17.docx; AO PROPOSED STAFFING NEEDS - OCHP 12-7-17.xlsx

Reggie,

I made a couple of minor edits to the Managing FTE document and added one comment. I also made edits to the OCHP entry in the Staffing needs spreadsheet. Please let me know if you have question regarding these submissions.

Ex. 5 - Deliberative Process

Thanks,
Khesha Reed
Deputy Director
Office of Children's Health Protection
202-566-0594

From: Lesperance, Twanna
Sent: Tuesday, December 05, 2017 8:01 PM
To: Allen, Reginald <Allen.Reginald@epa.gov>; Bailey, KevinJ <Bailey.KevinJ@epa.gov>; Benjamin-Sirmons, Denise <Benjamin-Sirmons.Denise@epa.gov>; Brennan, Thomas <Brennan.Thomas@epa.gov>; Campbell, Jennie <Campbell.Jennie@epa.gov>; Caraballo, Mario <Caraballo.Mario@epa.gov>; Etzel, Ruth <Etzel.Ruth@epa.gov>; Grantham, Nancy <Grantham.Nancy@epa.gov>; Hope, Brian <Hope.Brian@epa.gov>; Johnston, Khanna <Johnston.Khanna@epa.gov>; Lawrence, Tanya <Lawrence.Tanya@epa.gov>; Lesperance, Twanna <Lesperance.Twanna@epa.gov>; McCluney, Lance <McCluney.Lance@epa.gov>; Reed, Khesha <Reed.Khesha@epa.gov>; Richardson, RobinH <Richardson.RobinH@epa.gov>; Rogers, JoanB <Rogers.JoanB@epa.gov>; Torres, Ramon <Torres.Ramon@epa.gov>; White, Elizabeth <white.elizabeth@epa.gov>; Wooden-Aguilar, Helena <Wooden-Aguilar.Helena@epa.gov>; Zarba, Christopher <Zarba.Christopher@epa.gov>; Kime, Robin <Kime.Robin@epa.gov>; Fraser, Scott <Fraser.Scott@epa.gov>
Subject: AO - Managing FTE Levels (Revised 12-5-17).docx

Teammates

On behalf of Reggie, I am sending the revised AO Strategy for managing FTE levels for your review and comments. This version includes additional points made during our discussion with Helena at last Thursday's SOD Huddle. Please send your comments and questions to Reggie, and copy me, by noon on Thursday.

In addition, you will find attached an updated version of the list of pending and new personnel requests we sent to Helena. She is reviewing the list to make the final decisions on what requests can move during the pause.

Thanks,
Twanna

Twanna Lesperance, Assistant Director, AMS, PMO
Office of Administrative and Executive Services
Office of the Administrator, EPA
202-564-0419 (Desk)
lesperance.twanna@epa.gov

Message

From: McCluney, Lance [McCluney.Lance@epa.gov]
Sent: 12/6/2017 12:49:25 PM
To: Lesperance, Twanna [Lesperance.Twanna@epa.gov]
CC: Allen, Reginald [Allen.Reginald@epa.gov]
Subject: RE: AO - Managing FTE Levels (Revised 12-5-17).docx
Attachments: AO - Managing FTE Levels (Revised 12-5-17)_lm.docx

Twanna,

This looks good to me. I made a few minor changes. I used tracked changes, so you can see what I did.

Thanks,
Lance

From: Lesperance, Twanna
Sent: Tuesday, December 05, 2017 8:01 PM
To: Allen, Reginald <Allen.Reginald@epa.gov>; Bailey, KevinJ <Bailey.KevinJ@epa.gov>; Benjamin-Sirmons, Denise <Benjamin-Sirmons.Denise@epa.gov>; Brennan, Thomas <Brennan.Thomas@epa.gov>; Campbell, Jennie <Campbell.Jennie@epa.gov>; Caraballo, Mario <Caraballo.Mario@epa.gov>; Etzel, Ruth <Etzel.Ruth@epa.gov>; Grantham, Nancy <Grantham.Nancy@epa.gov>; Hope, Brian <Hope.Brian@epa.gov>; Johnston, Khanna <Johnston.Khanna@epa.gov>; Lawrence, Tanya <Lawrence.Tanya@epa.gov>; Lesperance, Twanna <Lesperance.Twanna@epa.gov>; McCluney, Lance <McCluney.Lance@epa.gov>; Reed, Khesha <Reed.Khesha@epa.gov>; Richardson, RobinH <Richardson.RobinH@epa.gov>; Rogers, JoanB <Rogers.JoanB@epa.gov>; Torres, Ramon <Torres.Ramon@epa.gov>; White, Elizabeth <white.elizabeth@epa.gov>; Wooden-Aguilar, Helena <Wooden-Aguilar.Helena@epa.gov>; Zarba, Christopher <Zarba.Christopher@epa.gov>; Kime, Robin <Kime.Robin@epa.gov>; Fraser, Scott <Fraser.Scott@epa.gov>
Subject: AO - Managing FTE Levels (Revised 12-5-17).docx

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In addition, you will find attached an updated version of the list of pending and new personnel requests we sent to Helena. She is reviewing the list to make the final decisions on what requests can move during the pause.

Thanks,
Twanna

*Twanna Lesperance, Assistant Director, AMS, PMO
Office of Administrative and Executive Services
Office of the Administrator, EPA
202-564-0419 (Desk)
lesperance.twanna@epa.gov*

Message

From: Lesperance, Twanna [Lesperance.Twanna@epa.gov]
Sent: 12/6/2017 1:01:11 AM
To: Allen, Reginald [Allen.Reginald@epa.gov]; Bailey, KevinJ [Bailey.KevinJ@epa.gov]; Benjamin-Sirmons, Denise [Benjamin-Sirmons.Denise@epa.gov]; Brennan, Thomas [Brennan.Thomas@epa.gov]; Campbell, Jennie [Campbell.Jennie@epa.gov]; Caraballo, Mario [Caraballo.Mario@epa.gov]; Etzel, Ruth [Etzel.Ruth@epa.gov]; Grantham, Nancy [Grantham.Nancy@epa.gov]; Hope, Brian [Hope.Brian@epa.gov]; Johnston, Khanna [Johnston.Khanna@epa.gov]; Lawrence, Tanya [Lawrence.Tanya@epa.gov]; Lesperance, Twanna [Lesperance.Twanna@epa.gov]; McCluney, Lance [McCluney.Lance@epa.gov]; Reed, Khesha [Reed.Khesha@epa.gov]; Richardson, RobinH [Richardson.RobinH@epa.gov]; Rogers, JoanB [Rogers.JoanB@epa.gov]; Torres, Ramon [Torres.Ramon@epa.gov]; White, Elizabeth [white.elizabeth@epa.gov]; Wooden-Aguilar, Helena [Wooden-Aguilar.Helena@epa.gov]; Zarba, Christopher [Zarba.Christopher@epa.gov]; Kime, Robin [Kime.Robin@epa.gov]; Fraser, Scott [Fraser.Scott@epa.gov]
Subject: AO - Managing FTE Levels (Revised 12-5-17).docx
Attachments: AO - Managing FTE Levels (Revised 12-5-17).docx

<!--[if lte mso 15 || CheckWebRef]-->

Lesperance, Twanna has shared a OneDrive for Business file with you. To view it, click the link below.



AO PROPOSED STAFFING NEEDS - MASTER.xlsx

<!--[endif]-->

Teammates

On behalf of Reggie, I am sending the revised AO Strategy for managing FTE levels for your review and comments. This version includes additional points made during our discussion with Helena at last Thursday's SOD Huddle. Please send your comments and questions to Reggie, and copy me, by noon on Thursday.

In addition, you will find attached an updated version of the list of pending and new personnel requests we sent to Helena. She is reviewing the list to make the final decisions on what requests can move during the pause.

Thanks,
Twanna

Twanna Lesperance, Assistant Director, AMS, PMO
Office of Administrative and Executive Services
Office of the Administrator, EPA
202-564-0419 (Desk)
lesperance.twanna@epa.gov

Message

From: Wooden-Aguilar, Helena [Wooden-Aguilar.Helena@epa.gov]
Sent: 11/20/2017 10:08:51 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]
CC: McCluney, Lance [McCluney.Lance@epa.gov]; Lesperance, Twanna [Lesperance.Twanna@epa.gov]; Cortes, Emilio [Cortes.Emilio@epa.gov]
Subject: Fwd: Managing interim FTE levels
Attachments: Managing FTE Levels Templatefinal draft.docx; ATT00001.htm; Managing our FTE - process rev.docx; ATT00002.htm; EPA Attrition Rates.xlsx; ATT00003.htm

Good Evening-

Thank you for agreeing to send out the message to all the office managers (to include OP, OCIR, OPA, OHS, and OPEE) with the FTE strategy template below.

As we agreed, all offices will submit a strategy to me with their plans and their pending hires prioritized. It would be good for their pending hires to be justified.

Looking forward to receiving them all (and the one from OAES) and thanks for agreeing to send it out tonight.

Helena

Helena Wooden-Aguilar
Acting Deputy Chief of Staff
Office of the Administrator
U.S. Environmental Protection Agency
202-564-0792 (office)
Ex. 6 (mobile)
wooden-aguilar.helena@epa.gov

Begin forwarded message:

From: "Vizian, Donna" <Vizian.Donna@epa.gov>
Date: November 15, 2017 at 7:01:44 PM EST
To: 2017HQfirstassistants <2017HQfirstassistants@epa.gov>, 2017Regionfirstassistants <2017Regionfirstassistants@epa.gov>
Cc: "Showman, John" <Showman.John@epa.gov>
Subject: Managing interim FTE levels

Hi Everyone,

Attached is a revised draft template that hopefully addresses the comments we received. I am also including the paper Mike provided last week for easy reference and attrition rates by office. Please remember that these rates may be higher than average due to the buyout programs we implemented over the past few years. As we agreed on Tuesday, please come to the EMC with a completed

draft. Please also send in advance any questions or concerns to be discussed at the EMC. Please send them to David, me and John. Thanks

Best,
Donna

Message

From: Perry, Corey [Perry.Corey@epa.gov]
Sent: 10/27/2017 5:29:05 PM
To: Wooden-Aguilar, Helena [Wooden-Aguilar.Helena@epa.gov]
CC: Allen, Reginald [Allen.Reginald@epa.gov]; Taylor, Jeremy [Taylor.Jeremy@epa.gov]
Subject: FW: Justifications for GS-14/15 Actions
Attachments: VERA.VSIP_17 1134247_0110.15_recruitment.docx; VERA.VSIP_17 1682789_0110.15_recruitment (Autosaved).docx; Copy of Copy of VERA VSIP SRO Follow Up Request - AM - AO.XLSX

Importance: High

Here is the email I just referenced. Reggie can hopefully fill you in on the background of any internal decisions that have been discussed in regards to AO's VERA/VSIP plans.

Again, I am available for a quick chat if needed. It's actually quiet here today!

~Corey

From: Perry, Corey
Sent: Thursday, October 26, 2017 3:26 PM
To: Allen, Reginald <Allen.Reginald@epa.gov>
Cc: Taylor, Jeremy <Taylor.Jeremy@epa.gov>
Subject: FW: Justifications for GS-14/15 Actions
Importance: High

Hi Reggie,

As SRO,

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

One other house-keeping item

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Thanks,
Corey

919-541-5353

From: Goldring, Sharquita
Sent: Wednesday, October 25, 2017 3:10 PM
To: Perry, Corey <Perry.Corey@epa.gov>; Taylor, Jeremy <Taylor.Jeremy@epa.gov>
Subject: FW: Justifications for GS-14/15 Actions
Importance: High

Hi Corey and Jeremy,

Attached is OP's justification for the 2 NCEE recruitment actions for the GS 15 positions. Please let me know if you need something further from us.

Sharquita

Sharquita Goldring
Office of Policy (MC: 1104A)

ED_001372E_00000344-00001

Operations Team
U.S. Environmental Protection Agency
William Jefferson Clinton Federal Building
1200 Pennsylvania Ave., NW
Room 3521F
Washington, DC 20460

(202) 566-2173 (ph)
Ex. 6 (cell)
Goldring.sharquita@epa.gov

"Life isn't about waiting for the storm to pass, It's about learning to dance in the rain"

From: Peppins, Felicia
Sent: Thursday, October 12, 2017 10:27 AM
To: Campbell, Jennie <Campbell.Jennie@epa.gov>
Cc: Goldring, Sharquita <Goldring.Sharquita@epa.gov>; Lesperance, Twanna <Lesperance.Twanna@epa.gov>
Subject: FW: Justifications for GS-14/15 Actions
Importance: High

Hi Jennie/Sharquita,

Please see below the response from RTP regarding the two Economist Leaders, RTP needs further explanation. Please provide me this information ASAP so that we can get our combined response in to RTP. Thanks.

Ex. 5 - Deliberative Process

Felicia A. Peppins, Program Analyst
U.S. Environmental Protection Agency
Office of the Administrator
Office of Administrative and Executive Services
1200 Pennsylvania Avenue, N.W.
Room 2432U WJC-North Mail Code 1104A
Washington, DC 20460
202-564-7428

From: Taylor, Jeremy
Sent: Tuesday, October 10, 2017 3:58 PM
To: Allen, Reginald <Allen.Reginald@epa.gov>; Helm, Arron <Helm.Arron@epa.gov>
Cc: Collins, BJ <Collins.BJ@epa.gov>; Perry, Corey <Perry.Corey@epa.gov>; Lesperance, Twanna <Lesperance.Twanna@epa.gov>; Peppins, Felicia <Peppins.Felicia@epa.gov>; Atkinson, Ryan <Atkinson.Ryan@epa.gov>; Crum, Kim <Crum.Kim@epa.gov>
Subject: RE: Justifications for GS-14/15 Actions

Hello Reggie,

We have reviewed AO's responses and will need some more follow-up information:

Ex. 5 - Deliberative Process

We appreciate your work with us to document your plans for post VERA/VSIP activity. I know that we are asking for a good bit but we want to ensure that we can properly document the reasoning of the office when we are asked.

Thank you,

Jeremy A. Taylor
OARM-RTP-HRMD
Director
919-541-0537



CONFIDENTIALITY: This communication may contain privileged or other confidential information. If you are not the intended addressee, or believe you have received this communication in error, you may neither copy, disseminate, nor distribute it to anyone else or use it in any unauthorized manner; to do so is strictly prohibited and may be unlawful. If you receive this email by mistake, please advise the sender immediately by using the reply facility in your mail software and delete it from your computer. "Information in this message may be subject to the Privacy Act (5 USC 552a) and should be treated accordingly."

Direct 202-564-1029

Cell Ex. 6

Message

From: McCluney, Lance [McCluney.Lance@epa.gov]
Sent: 11/28/2017 2:30:12 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]
Subject: RE: FTE exercise
Attachments: Managing FTE Levels - AO.docx

Reggie,

Here is my stab at this.

Lance

From: Allen, Reginald
Sent: Tuesday, November 28, 2017 9:03 AM
To: McCluney, Lance <McCluney.Lance@epa.gov>
Subject: Fwd: FTE exercise

Lance
please take a shot at updating the one pager based on Helena's comments below I'm stuck in traffic but hopefully will be there by 9:30 or so
Reggie

Reginald E. Allen, SES
Assistant Deputy Chief of Staff
U.S. Environmental Protection Agency
Office 202-564-0444
Direct 202-564-1029
Cell Ex. 6 - Personal Privacy

Begin forwarded message:

From: "Wooden-Aguilar, Helena" <Wooden-Aguilar.Helena@epa.gov>
Date: November 28, 2017 at 7:38:29 AM EST
To: "Allen, Reginald" <Allen.Reginald@epa.gov>
Cc: "McCluney, Lance" <McCluney.Lance@epa.gov>, "Lesperance, Twanna" <Lesperance.Twanna@epa.gov>
Subject: **Re: FTE exercise**

Reggie-

Appreciate an opportunity to review the doc below and thank you again to your folks for putting it together. I do think you being apart of today Afternoon is so important and thanks for agreeing to be there. As shared I want to debrief with Lance/Twanna and then the SOD's. So if you could please help me capture the highlights from today's meeting that would be great. We can use this to debrief.

Lastly, I have a few questions/cmts on the paper.

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Helena

Helena Wooden-Aguilar
Acting Deputy Chief of Staff
Office of the Administrator
U.S. Environmental Protection Agency
202-564-0792 (office)
Ex. 6 - Personal Privacy (mobile)
wooden-aguilar.helena@epa.gov

On Nov 27, 2017, at 5:46 PM, Allen, Reginald <Allen.Reginald@epa.gov> wrote:

As requested

Reginald E. Allen, SES
Assistant Deputy Chief of Staff
U.S. Environmental Protection Agency
Office 202-564-0444
Direct 202-564-1029
Cell Ex. 6 - Personal Privacy

From: Wooden-Aguilar, Helena

Sent: Monday, November 27, 2017 5:44 PM

To: Allen, Reginald <Allen.Reginald@epa.gov>

Cc: McCluney, Lance <McCluney.Lance@epa.gov>; Lesperance, Twanna
<Lesperance.Twanna@epa.gov>

Subject: FTE exercise

Thanks for meeting today and I appreciate all the work you and your staff have done. If you could please send me the one pager you shared electronically to me this evening that would be great and I look forward to getting the remaining information by tomorrow 10 AM thanks again Helena

Helena Wooden-Aguilar
Acting Deputy Chief of Staff
Office of the Administrator
U.S. Environmental Protection Agency
202-564-0792 (office)

Ex. 6 - Personal Privacy

 (mobile)
wooden-aguilar.helena@epa.gov

<Managing FTE Levels - AO.docx>

Message

From: Lesperance, Twanna [Lesperance.Twanna@epa.gov]
Sent: 11/27/2017 11:01:16 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]
CC: McCluney, Lance [McCluney.Lance@epa.gov]
Subject: Documents for Proposed Approach to Managing AO FTE Levels
Attachments: AO - FTE Levels .docx; OAES - FTE LEVELS .docx; OCHP - FTE LEVELS.docx; OCIR - FTE LEVELS.docx; OCR - FTE LEVELS.docx; OEX - FTE LEVELS.docx; OHS - FTE LEVEL.docx; OPA - FTE LEVELS.docx; OPEEE - FTE LEVELS.docx; OSDBU - FTE LEVELS .docx; SAB - FTE LEVELS.docx; Summary of Impacts of reduced FTE levels.docx; AO PROPOSED STAFFING NEEDS - MASTER.xlsx

Reggie,

Attached is the complete set of documents for the proposed strategy and commitments, per office, to help manage AO FTE levels. Please let either me or Lance know if you have any questions.

Thanks,
Twanna

*Twanna Lesperance, Assistant Director, AMS, PMO
Office of Administrative and Executive Services
Office of the Administrator, EPA
202-564-0419 (Desk)
lesperance.twanna@epa.gov*

Message

From: Lesperance, Twanna [Lesperance.Twanna@epa.gov]
Sent: 11/30/2017 12:40:29 AM
To: Allen, Reginald [Allen.Reginald@epa.gov]; Bailey, KevinJ [Bailey.KevinJ@epa.gov]; Benjamin-Sirmons, Denise [Benjamin-Sirmons.Denise@epa.gov]; Brennan, Thomas [Brennan.Thomas@epa.gov]; Campbell, Jennie [Campbell.Jennie@epa.gov]; Caraballo, Mario [Caraballo.Mario@epa.gov]; Etzel, Ruth [Etzel.Ruth@epa.gov]; Grantham, Nancy [Grantham.Nancy@epa.gov]; Hope, Brian [Hope.Brian@epa.gov]; Johnston, Khanna [Johnston.Khanna@epa.gov]; Lawrence, Tanya [Lawrence.Tanya@epa.gov]; Lesperance, Twanna [Lesperance.Twanna@epa.gov]; McCluney, Lance [McCluney.Lance@epa.gov]; Reed, Khesha [Reed.Khesha@epa.gov]; Richardson, RobinH [Richardson.RobinH@epa.gov]; Rogers, JoanB [Rogers.JoanB@epa.gov]; Torres, Ramon [Torres.Ramon@epa.gov]; White, Elizabeth [white.elizabeth@epa.gov]; Wooden-Aguilar, Helena [Wooden-Aguilar.Helena@epa.gov]; Zarba, Christopher [Zarba.Christopher@epa.gov]
Subject: FW: Proposed Approach to Managing AO FTE Levels - UPDATED AO PROPOSED STAFFING CHART
Attachments: OCHP - FTE LEVELS.docx; OCIR - FTE LEVELS.docx; OCR - FTE LEVELS.docx; OEX - FTE LEVELS.docx; OHS - FTE LEVEL.docx; OPA - FTE LEVELS.docx; OPEEE - FTE LEVELS.docx; OSDBU - FTE LEVELS .docx; SAB - FTE LEVELS.docx; Summary of Impacts of reduced FTE levels.docx; AO PROPOSED STAFFING NEEDS - MASTER.xlsx; OAES - FTE Levels.docx; AO - Managing FTE Levels.docx

All,

I have updated the AO Proposed Staffing Chart to include new proposed hire for OPA's. It was inadvertently omitted from the earlier chart shared in Reggie's not on Tuesday, November 28, 2017.

Thanks,
Twanna

*Twanna Lesperance, Assistant Director, AMS, PMO
Office of Administrative and Executive Services
Office of the Administrator, EPA
202-564-0419 (Desk)
lesperance.twanna@epa.gov*

From: Allen, Reginald
Sent: Tuesday, November 28, 2017 6:37 PM
Subject: Proposed Approach to Managing AO FTE Levels

Teammates

In the interest of full transparency and to help the discussion on Thursday Helena wanted to make sure you have all the submission we have received to date.

Please find attached the following documents

- AO Managing FTE levels – current draft
- AO Proposed Staffing Spreadsheet – working document from the input we received from you – if you have updates please send them.
- Summary of Impacts from the Offices
- Office submissions

Best
Reggie

Reginald E. Allen, SES

Assistant Deputy Chief of Staff

U.S. Environmental Protection Agency

Office 202-564-0444

Direct 202-564-1029

Cell **Ex. 6**

Message

From: Peppins, Felicia [Peppins.Felicia@epa.gov]
Sent: 10/3/2017 9:01:57 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]
CC: Lesperance, Twanna [Lesperance.Twanna@epa.gov]; Miles, Ramona [Miles.Ramona@epa.gov]; Johnson, Melissa [Johnson.Melissa@epa.gov]; Hunt, Tracy [Hunt.Tracy@epa.gov]; Moten, Ericka [moten.ericka@epa.gov]; Abate, Hana [abate.hana@epa.gov]; Sutkus, Elyse [sutkus.elyse@epa.gov]; Tomlin, Matthew [tomlin.matthew@epa.gov]
Subject: Justifications for GS-14/15 Actions - #2
Attachments: VERA.VSIP_17 1700078_0301-14_recruitment.docx; VERA.VSIP_17 1639274_0301-13.14_detail.docx; VERA.VSIP_17 1262547_0343-14_recruitment.docx; VERA.VSIP_17 1486920_1001-14_recruitment (002).docx; VERA.VSIP_17 1706673_1001-14_recruitment (002).docx; VERA.VSIP_17 1421395_1001-14_temp promotion.docx; VERA.VSIP_17 0865861_0110-15_temp promotion.docx; VERA.VSIP_17 1134247_0110.15_recruitment.docx; VERA.VSIP_17 1682789_0110.15_recruitment.docx

Final version of justifications with AO's managers input. Still didn't get anything additional from OP.

Felicia A. Peppins, Program Analyst
U.S. Environmental Protection Agency
Office of the Administrator
Office of Administrative and Executive Services
1200 Pennsylvania Avenue, N.W.
Room 2432U WJC-North Mail Code 1104A
Washington, DC 20460
202-564-7428

From: Peppins, Felicia
Sent: Monday, October 02, 2017 3:01 PM
To: Allen, Reginald <Allen.Reginald@epa.gov>
Cc: Lesperance, Twanna <Lesperance.Twanna@epa.gov>; Abate, Hana <abate.hana@epa.gov>; Sutkus, Elyse <sutkus.elyse@epa.gov>; Tomlin, Matthew <tomlin.matthew@epa.gov>; Hunt, Tracy <Hunt.Tracy@epa.gov>; Johnson, Melissa <Johnson.Melissa@epa.gov>; Miles, Ramona <Miles.Ramona@epa.gov>; Moten, Ericka <moten.ericka@epa.gov>
Subject: FW: Justifications for GS-14/15 Actions

Reggie,

Attached you will find our justifications for AO's recruitment, detail and temporary promotion actions. Collectively, we worked on this based on our knowledge of the offices and their needs. We recommend that you review and share it with those offices affected to ensure the justification are suitable to them meeting the mission of their organization, prior to moving this forward to RTP.

Additionally, we prepared responses for OP's actions and learned through Sharquita, who came up to assist us, that OP's management has been working on their own response to forward to RTP.

That following justifications apply to the nine actions:

- 1.
- 2.
- 3.

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Thanks.

Felicia A. Peppins, Program Analyst
U.S. Environmental Protection Agency
Office of the Administrator
Office of Administrative and Executive Services
1200 Pennsylvania Avenue, N.W.
Room 2432U WJC-North Mail Code 1104A
Washington, DC 20460
202-564-7428

Message

From: Reed, Khesha [Reed.Khesha@epa.gov]
Sent: 11/27/2017 7:00:11 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]
CC: McCluney, Lance [McCluney.Lance@epa.gov]; Lesperance, Twanna [Lesperance.Twanna@epa.gov]; Etzel, Ruth [Etzel.Ruth@epa.gov]
Subject: RE: AO FTE Management and Staffing Requirements
Attachments: Managing FTE Levels OCHP 11-27-17.docx

Thanks for the clarification. Apologies for the delay. Please let me know if you have questions.

Khesha
566-0594

From: Allen, Reginald
Sent: Sunday, November 26, 2017 9:31 PM
To: Wooden-Aguilar, Helena <Wooden-Aguilar.Helena@epa.gov>; Bailey, KevinJ <Bailey.KevinJ@epa.gov>; Benjamin-Sirmons, Denise <Benjamin-Sirmons.Denise@epa.gov>; Brennan, Thomas <Brennan.Thomas@epa.gov>; Campbell, Jennie <Campbell.Jennie@epa.gov>; Caraballo, Mario <Caraballo.Mario@epa.gov>; Etzel, Ruth <Etzel.Ruth@epa.gov>; Grantham, Nancy <Grantham.Nancy@epa.gov>; Hope, Brian <Hope.Brian@epa.gov>; Johnston, Khanna <Johnston.Khanna@epa.gov>; Lawrence, Tanya <Lawrence.Tanya@epa.gov>; Lesperance, Twanna <Lesperance.Twanna@epa.gov>; McCluney, Lance <McCluney.Lance@epa.gov>; Reed, Khesha <Reed.Khesha@epa.gov>; Richardson, RobinH <Richardson.RobinH@epa.gov>; Rogers, JoanB <Rogers.JoanB@epa.gov>; Torres, Ramon <Torres.Ramon@epa.gov>; White, Elizabeth <white.elizabeth@epa.gov>; Zarba, Christopher <Zarba.Christopher@epa.gov>; Kime, Robin <Kime.Robin@epa.gov>
Cc: Fraser, Scott <Fraser.Scott@epa.gov>
Subject: RE: AO FTE Management and Staffing Requirements

Teammates

A couple of folks have asked about

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Please give us your best shot by noon Monday on the requirements below.

Thanks
Reggie

Reginald E. Allen, SES
Assistant Deputy Chief of Staff
U.S. Environmental Protection Agency
Office 202-564-0444
Direct 202-564-1029
Cell **Ex. 6**

From: Wooden-Aguilar, Helena

Sent: Tuesday, November 21, 2017 8:04 AM

To: Allen, Reginald <Allen.Reginald@epa.gov>; Bailey, KevinJ <Bailey.KevinJ@epa.gov>; Benjamin-Sirmons, Denise <Benjamin-Sirmons.Denise@epa.gov>; Brennan, Thomas <Brennan.Thomas@epa.gov>; Campbell, Jennie <Campbell.Jennie@epa.gov>; Caraballo, Mario <Caraballo.Mario@epa.gov>; Etzel, Ruth <Etzel.Ruth@epa.gov>; Grantham, Nancy <Grantham.Nancy@epa.gov>; Hope, Brian <Hope.Brian@epa.gov>; Johnston, Khanna <Johnston.Khanna@epa.gov>; Lawrence, Tanya <Lawrence.Tanya@epa.gov>; Lesperance, Twanna <Lesperance.Twanna@epa.gov>; McCluney, Lance <McCluney.Lance@epa.gov>; Reed, Khesha <Reed.Khesha@epa.gov>; Richardson, RobinH <Richardson.RobinH@epa.gov>; Rogers, JoanB <Rogers.JoanB@epa.gov>; Torres, Ramon <Torres.Ramon@epa.gov>; White, Elizabeth <white.elizabeth@epa.gov>; Zarba, Christopher <Zarba.Christopher@epa.gov>; Kime, Robin <Kime.Robin@epa.gov>

Cc: Fraser, Scott <Fraser.Scott@epa.gov>; Eng, Connie <Eng.Connie@epa.gov>; Cortes, Emilio <Cortes.Emilio@epa.gov>

Subject: RE: AO FTE Management and Staffing Requirements

Thank you all again for your assistance with this exercise. I know it's a quick turnaround!

Have a great holiday on Thursday and thank you all for what you do.

Helena

From: Allen, Reginald

Sent: Monday, November 20, 2017 7:19 PM

To: Allen, Reginald <Allen.Reginald@epa.gov>; Bailey, KevinJ <Bailey.KevinJ@epa.gov>; Benjamin-Sirmons, Denise <Benjamin-Sirmons.Denise@epa.gov>; Brennan, Thomas <Brennan.Thomas@epa.gov>; Campbell, Jennie <Campbell.Jennie@epa.gov>; Caraballo, Mario <Caraballo.Mario@epa.gov>; Etzel, Ruth <Etzel.Ruth@epa.gov>; Grantham, Nancy <Grantham.Nancy@epa.gov>; Hope, Brian <Hope.Brian@epa.gov>; Johnston, Khanna <Johnston.Khanna@epa.gov>; Lawrence, Tanya <Lawrence.Tanya@epa.gov>; Lesperance, Twanna <Lesperance.Twanna@epa.gov>; McCluney, Lance <McCluney.Lance@epa.gov>; Reed, Khesha <Reed.Khesha@epa.gov>; Richardson, RobinH <Richardson.RobinH@epa.gov>; Rogers, JoanB <Rogers.JoanB@epa.gov>; Torres, Ramon <Torres.Ramon@epa.gov>; White, Elizabeth <white.elizabeth@epa.gov>; Wooden-Aguilar, Helena <Wooden-Aguilar.Helena@epa.gov>; Zarba, Christopher <Zarba.Christopher@epa.gov>; Kime, Robin <Kime.Robin@epa.gov>

Cc: Fraser, Scott <Fraser.Scott@epa.gov>; Eng, Connie <Eng.Connie@epa.gov>

Subject: AO FTE Management and Staffing Requirements

Importance: High

Teammates

Attached, for your action are three requirements that are needed from you to inform AOs response to agency level taskings that are due from us next Tuesday.

The first requirement is filling out the Managing FTE levels template (attached) that you have seen before – we are now asking that you answer the questions for your office and return the completed sheet not later than **noon Monday the 27th of Nov 2017**. This is absolutely the maximum amount of time we can provide as we must take input from every office and produce a consolidated AO document by the next morning. If you can provide it earlier that would be great as we will have less than 24 hours to turn it. The second attachment is governance principles from Mike Flynn.

The second requirement is providing information on your hiring planning and pending hires / actions. Please fill out the attached spreadsheet with the required information as listed in the columns and per the example on the 1st entry on the sheet. The purpose of this sheet is to ensure that we have identified all your requirements, understand your priorities within your hiring actions, (you must prioritize) and understand your justifications as we move forward in developing our AO wide plan to address projected FTE cuts. Again we need your completed sheet not later than **noon Monday the 27th of Nov 2017 for the same reason as above. Some additional spreadsheet info below signature block.**

Finally the third action that is required was directed by the Chief of Staff asking that each staff office provide their planned travel events / expenditures for the remainder of this year and the first quarter of next year by the end of this week. Please provide to us by **noon Friday the 24th of Nov 2017** with the Event, Purpose, Date, Location, Attendees and estimated cost of the travel and we will combine for Helena and Ryan.

Please let me or Twanna know if you have an questions or concerns and apologizes for the holiday short suspenses but they could not be avoided.

Best
Reggie

Reginald E. Allen, SES
Assistant Deputy Chief of Staff
U.S. Environmental Protection Agency
Office 202-564-0444
Direct 202-564-1029
Cell Ex. 6

Additional Spreadsheet Details

The columns in the spreadsheet are self-explanatory but for column J see below:

To help determine AO's best approach to developing a reasonable strategy, you will need to categorize each of your potential actions. **The assigned levels in the "PRIORITY CATEGORY " column are:**

1. Non-Career Appointment
2. Administrator's Priorities
3. Mandated by law or agency requirement
4. Supervisor/Manager
5. Detail with NTE term(s)
6. Other

This information will be communicated to the SCC – RTP and ERD as well as your assigned analyst. To minimize the telephone calls and interruptions to RTP, we are asking that you pause on contacting RTP unless you are responding to their request for information. I have from their senior manager that the number of telephones calls from AO is one of the biggest hindrances in moving our actions and only results into a much slower process. In other words, we believe the work will be better managed if RTP can control the process by reaching out to you as needed. As part of tracking process, RTP has agreed to keep your assign analyst in all communication; therefore, your assigned analysts have been asked to provide you with daily updates.

We also want to continue to encourage offices to consider using career development programs, Talent Hub announcements, Skill Marketplace Projects, volunteers, etc. when identifying ways to meet your current needs.

If you have questions about this message, please contact your assigned analysts, Twanna, or me for assistance. We appreciate your patience and look forward to identifying strategies to meet AO's needs and to do our part to support the Agency-wide goals.

Message

From: Benjamin-Sirmons, Denise [Benjamin-Sirmons.Denise@epa.gov]
Sent: 11/27/2017 4:37:41 PM
To: Wooden-Aguilar, Helena [Wooden-Aguilar.Helena@epa.gov]; Allen, Reginald [Allen.Reginald@epa.gov]
CC: Lesperance, Twanna [Lesperance.Twanna@epa.gov]; Rogers, JoanB [Rogers.JoanB@epa.gov]
Subject: RE: AO FTE Management and Staffing Requirements
Attachments: Managing FTE Levels Template OSDBU 11.27.17.docx

OSDBU's completed managing FTE levels template is attached, with our responses in green. Since we do not have any hiring plans, we did not have to complete the spreadsheet.

Please let me or Joan know if you have any questions. Thanks.

Denise Benjamin Sirmons, Director
Office of Small and Disadvantaged Business Utilization
U.S. Environmental Protection Agency
P: 202-564-6771; F: 202-566-1505
"Small Business First"

From: Allen, Reginald
Sent: Monday, November 20, 2017 7:19 PM
To: Allen, Reginald <Allen.Reginald@epa.gov>; Bailey, KevinJ <Bailey.KevinJ@epa.gov>; Benjamin-Sirmons, Denise <Benjamin-Sirmons.Denise@epa.gov>; Brennan, Thomas <Brennan.Thomas@epa.gov>; Campbell, Jennie <Campbell.Jennie@epa.gov>; Caraballo, Mario <Caraballo.Mario@epa.gov>; Etzel, Ruth <Etzel.Ruth@epa.gov>; Grantham, Nancy <Grantham.Nancy@epa.gov>; Hope, Brian <Hope.Brian@epa.gov>; Johnston, Khanna <Johnston.Khanna@epa.gov>; Lawrence, Tanya <Lawrence.Tanya@epa.gov>; Lesperance, Twanna <Lesperance.Twanna@epa.gov>; McCluney, Lance <McCluney.Lance@epa.gov>; Reed, Khesha <Reed.Khesha@epa.gov>; Richardson, RobinH <Richardson.RobinH@epa.gov>; Rogers, JoanB <Rogers.JoanB@epa.gov>; Torres, Ramon <Torres.Ramon@epa.gov>; White, Elizabeth <white.elizabeth@epa.gov>; Wooden-Aguilar, Helena <Wooden-Aguilar.Helena@epa.gov>; Zarba, Christopher <Zarba.Christopher@epa.gov>; Kime, Robin <Kime.Robin@epa.gov>
Cc: Fraser, Scott <Fraser.Scott@epa.gov>; Eng, Connie <Eng.Connie@epa.gov>
Subject: AO FTE Management and Staffing Requirements
Importance: High

Teammates

Attached, for your action are three requirements that are needed from you to inform AOs response to agency level taskings that are due from us next Tuesday.

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AO wide plan to address projected FTE cuts. Again we need your completed sheet not later than **noon Monday the 27th of Nov 2017 for the same reason as above. Some additional spreadsheet info below signature block.**

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Please let me or Twanna know if you have an questions or concerns and apologizes for the holiday short suspenses but they could not be avoided.

Best
Reggie

Reginald E. Allen, SES
Assistant Deputy Chief of Staff
U.S. Environmental Protection Agency
Office 202-564-0444
Direct 202-564-1029
Cell Ex. 6

Additional Spreadsheet Details

The columns in the spreadsheet are self-explanatory but for column J see below:

To help determine AO's best approach to developing a reasonable strategy, you will need to categorize each of your potential actions. **The assigned levels in the "PRIORITY CATEGORY " column are:**

1. Non-Career Appointment
2. Administrator's Priorities
3. Mandated by law or agency requirement
4. Supervisor/Manager
5. Detail with NTE term(s)
6. Other

This information will be communicated to the SCC – RTP and ERD as well as your assigned analyst. To minimize the telephone calls and interruptions to RTP, we are asking that you pause on contacting RTP unless you are responding to their request for information. I have from their senior manager that the number of telephones calls from AO is one of the biggest hindrances in moving our actions and only results into a much slower process. In other words, we believe the work will be better managed if RTP can control the process by reaching out to you as needed. As part of tracking process, RTP has agreed to keep your assign analyst in all communication; therefore, your assigned analysts have been asked to provide you with daily updates.

We also want to continue to encourage offices to consider using career development programs, Talent Hub announcements, Skill Marketplace Projects, volunteers, etc. when identifying ways to meet your current needs.

If you have questions about this message, please contact your assigned analysts, Twanna, or me for assistance. We appreciate your patience and look forward to identifying strategies to meet AO's needs and to do our part to support the Agency-wide goals.

Message

From: Lawrence, Tanya [Lawrence.Tanya@epa.gov]
Sent: 11/24/2017 5:13:19 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]; Lesperance, Twanna [Lesperance.Twanna@epa.gov]
Subject: RE: AO FTE Management and Staffing Requirements
Attachments: Travel FY18 OCR Nov 24 2017.docx; Managing FTE Levels Templatefinal draft civil rights Nov 22 2017.docx; Copy of AO PROPOSED STAFFING NEEDS civil rights Nov 22 2017.xlsx

Hi Reggie and Twanna – Here are OCR's responses.

Thanks,
Tanya

Tanya Lawrence
Acting Director
Office of Civil Rights
Environmental Protection Agency
202-564-7272
202-501-1836 (fax)

From: Allen, Reginald
Sent: Monday, November 20, 2017 7:19 PM
To: Allen, Reginald <Allen.Reginald@epa.gov>; Bailey, KevinJ <Bailey.KevinJ@epa.gov>; Benjamin-Sirmons, Denise <Benjamin-Sirmons.Denise@epa.gov>; Brennan, Thomas <Brennan.Thomas@epa.gov>; Campbell, Jennie <Campbell.Jennie@epa.gov>; Caraballo, Mario <Caraballo.Mario@epa.gov>; Etzel, Ruth <Etzel.Ruth@epa.gov>; Grantham, Nancy <Grantham.Nancy@epa.gov>; Hope, Brian <Hope.Brian@epa.gov>; Johnston, Khanna <Johnston.Khanna@epa.gov>; Lawrence, Tanya <Lawrence.Tanya@epa.gov>; Lesperance, Twanna <Lesperance.Twanna@epa.gov>; McCluney, Lance <McCluney.Lance@epa.gov>; Reed, Khesha <Reed.Khesha@epa.gov>; Richardson, RobinH <Richardson.RobinH@epa.gov>; Rogers, JoanB <Rogers.JoanB@epa.gov>; Torres, Ramon <Torres.Ramon@epa.gov>; White, Elizabeth <white.elizabeth@epa.gov>; Wooden-Aguilar, Helena <Wooden-Aguilar.Helena@epa.gov>; Zarba, Christopher <Zarba.Christopher@epa.gov>; Kime, Robin <Kime.Robin@epa.gov>
Cc: Fraser, Scott <Fraser.Scott@epa.gov>; Eng, Connie <Eng.Connie@epa.gov>
Subject: AO FTE Management and Staffing Requirements
Importance: High

Teammates

Attached, for your action are three requirements that are needed from you to inform AOs response to agency level taskings that are due from us next Tuesday.

The first requirement is fulling out the Managing FTE levels template (attached) that you have seen before – we are now asking that you answer the questions for your office and return the completed sheet not later than **noon Monday the 27th of Nov 2017**. This is absolutely the maximum amount of time we can provide as we must take input from every office and produce a consolidated AO document by the next morning. If you can provide it earlier that would be great as we will have less than 24 hours to turn it. The second attachment is governance principles from Mike Flynn.

The second requirement is providing information on your hiring planning and pending hires / actions. Please fill out the attached spreadsheet with the required information as listed in the columns and per the example on the 1st entry on the sheet. The purpose of this sheet is to ensure that we have identified all your requirements, understand your priorities within your hiring actions, (you must prioritize) and understand your justifications as we move forward in developing our

AO wide plan to address projected FTE cuts. Again we need your completed sheet not later than **noon Monday the 27th of Nov 2017 for the same reason as above. Some additional spreadsheet info below signature block.**

Finally the third action that is required was directed by the Chief of Staff asking that each staff office provide their planned travel events / expenditures for the remainder of this year and the first quarter of next year by the end of this week. Please provide to us by **noon Friday the 24th of Nov 2017** with the Event, Purpose, Date, Location, Attendees and estimated cost of the travel and we will combine for Helena and Ryan.

Please let me or Twanna know if you have an questions or concerns and apologizes for the holiday short suspenses but they could not be avoided.

Best
Reggie

Reginald E. Allen, SES
Assistant Deputy Chief of Staff
U.S. Environmental Protection Agency
Office 202-564-0444
Direct 202-564-1029
Cell Ex. 6 - Personal Privacy

Additional Spreadsheet Details

The columns in the spreadsheet are self-explanatory but for column J see below:

To help determine AO's best approach to developing a reasonable strategy, you will need to categorize each of your potential actions. **The assigned levels in the "PRIORITY CATEGORY " column are:**

1. Non-Career Appointment
2. Administrator's Priorities
3. Mandated by law or agency requirement
4. Supervisor/Manager
5. Detail with NTE term(s)
6. Other

This information will be communicated to the SCC – RTP and ERD as well as your assigned analyst. To minimize the telephone calls and interruptions to RTP, we are asking that you pause on contacting RTP unless you are responding to their request for information. I have from their senior manager that the number of telephones calls from AO is one of the biggest hindrances in moving our actions and only results into a much slower process. In other words, we believe the work will be better managed if RTP can control the process by reaching out to you as needed. As part of tracking process, RTP has agreed to keep your assign analyst in all communication; therefore, your assigned analysts have been asked to provide you with daily updates.

We also want to continue to encourage offices to consider using career development programs, Talent Hub announcements, Skill Marketplace Projects, volunteers, etc. when identifying ways to meet your current needs.

If you have questions about this message, please contact your assigned analysts, Twanna, or me for assistance. We appreciate your patience and look forward to identifying strategies to meet AO's needs and to do our part to support the Agency-wide goals.

Message

From: McCluney, Lance [McCluney.Lance@epa.gov]
Sent: 11/22/2017 4:54:03 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]; Lesperance, Twanna [Lesperance.Twanna@epa.gov]
Subject: Managing FTE Levels Template.docx
Attachments: Managing FTE Levels Template.docx

Reggie,

Here is the first cut. We left the last question for you ☺! Our goal was to keep it clean and simply.

Lance O. McCluney
Assistant Director, Resource Management Staff
Office of Administrative and Executive Services
Office of the Administrator
202-564-2944
mccluney.lance@epa.gov

Message

From: Caraballo, Mario [Caraballo.Mario@epa.gov]
Sent: 11/21/2017 5:58:23 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]
CC: Lesperance, Twanna [Lesperance.Twanna@epa.gov]; Fraser, Scott [Fraser.Scott@epa.gov]; Eng, Connie [Eng.Connie@epa.gov]; Wooden-Aguilar, Helena [Wooden-Aguilar.Helena@epa.gov]; Johnson, Melissa [Johnson.Melissa@epa.gov]
Subject: RE: AO FTE Management and Staffing Requirements
Attachments: Copy of AO PROPOSED STAFFING NEEDS .xlsx; Managing FTE Levels OHS Template (002).docx

Regi,

Attached, per your request are the three requirements requested.

1. The requirement for filling out the **Managing FTE levels template** see (attached).
2. The requirement is providing information on **hiring planning and pending hires / actions**. See (attached spreadsheet)
3. Planned travel events / expenditures for the remainder of this year and the first quarter of next year. All travel cost listed are approximates.

Purpose/Justification:

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Justification:

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Purpose/ Justification:

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Let me know if you need any additional information.

v/r

Mario Caraballo, CPD
Deputy Associate Administrator
Office of Homeland Security
U.S. Environmental Protection Agency
1200 Pennsylvania Ave, NW
Washington, DC 20460-0001
Office: 202.564.6971
iPhone: Ex. 6 - Personal Privacy
WJC North, Room 6426-F/Mail Code 1109A

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From: Allen, Reginald

Sent: Monday, November 20, 2017 7:19 PM

To: Allen, Reginald <Allen.Reginald@epa.gov>; Bailey, KevinJ <Bailey.KevinJ@epa.gov>; Benjamin-Sirmons, Denise <Benjamin-Sirmons.Denise@epa.gov>; Brennan, Thomas <Brennan.Thomas@epa.gov>; Campbell, Jennie <Campbell.Jennie@epa.gov>; Caraballo, Mario <Caraballo.Mario@epa.gov>; Etzel, Ruth <Etzel.Ruth@epa.gov>; Grantham, Nancy <Grantham.Nancy@epa.gov>; Hope, Brian <Hope.Brian@epa.gov>; Johnston, Khanna <Johnston.Khanna@epa.gov>; Lawrence, Tanya <Lawrence.Tanya@epa.gov>; Lesperance, Twanna <Lesperance.Twanna@epa.gov>; McCluney, Lance <McCluney.Lance@epa.gov>; Reed, Khesha <Reed.Khesha@epa.gov>; Richardson, RobinH <Richardson.RobinH@epa.gov>; Rogers, JoanB <Rogers.JoanB@epa.gov>; Torres, Ramon <Torres.Ramon@epa.gov>; White, Elizabeth <white.elizabeth@epa.gov>; Wooden-Aguilar, Helena <Wooden-Aguilar.Helena@epa.gov>; Zarba, Christopher <Zarba.Christopher@epa.gov>; Kime, Robin <Kime.Robin@epa.gov>

Cc: Fraser, Scott <Fraser.Scott@epa.gov>; Eng, Connie <Eng.Connie@epa.gov>

Subject: AO FTE Management and Staffing Requirements

Importance: High

Teammates

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Please let me or Twanna know if you have an questions or concerns and apologizes for the holiday short suspenses but they could not be avoided.

Best
Reggie

ED_001372E_00000477-00003

Reginald E. Allen, SES
Assistant Deputy Chief of Staff
U.S. Environmental Protection Agency
Office 202-564-0444
Direct 202-564-1029
Cell Ex. 6

Additional Spreadsheet Details

The columns in the spreadsheet are self-explanatory but for column J see below:

To help determine AO's best approach to developing a reasonable strategy, you will need to categorize each of your potential actions. **The assigned levels in the "PRIORITY CATEGORY " column are:**

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3. Mandated by law or agency requirement
4. Supervisor/Manager
5. Detail with NTE term(s)
6. Other

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We also want to continue to encourage offices to consider using career development programs, Talent Hub announcements, Skill Marketplace Projects, volunteers, etc. when identifying ways to meet your current needs.

If you have questions about this message, please contact your assigned analysts, Twanna, or me for assistance. We appreciate your patience and look forward to identifying strategies to meet AO's needs and to do our part to support the Agency-wide goals.

Message

From: Peppins, Felicia [Peppins.Felicia@epa.gov]
Sent: 10/2/2017 7:02:48 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]
CC: Lesperance, Twanna [Lesperance.Twanna@epa.gov]; Abate, Hana [abate.hana@epa.gov]; Sutkus, Elyse [sutkus.elyse@epa.gov]; Tomlin, Matthew [tomlin.matthew@epa.gov]; Hunt, Tracy [Hunt.Tracy@epa.gov]; Johnson, Melissa [Johnson.Melissa@epa.gov]; Miles, Ramona [Miles.Ramona@epa.gov]; Moten, Ericka [moten.ericka@epa.gov]
Subject: FW: Justifications for GS-14/15 Actions
Attachments: VERA.VSIP_17 0865861_0110-15_temp promotion.docx; VERA.VSIP_17 1134247_0110.15_recruitment.docx; VERA.VSIP_17 1262547_0343-14_recruitment.docx; VERA.VSIP_17 1421395_1001-14_temp promotion.docx; VERA.VSIP_17 1639274_0301-13.14_detail.docx; VERA.VSIP_17 1682789_0110.15_recruitment.docx; VERA.VSIP_17 1700078_0301-14_recruitment.docx; VERA.VSIP_17 1706673_1001-14_recruitment (002).docx; VERA.VSIP_17 1486920_1001-14_recruitment (002).docx

Reggie,

Attached you will find our justifications for AO's recruitment, detail and temporary promotion actions. Collectively, we worked on this based on our knowledge of the offices and their needs. We recommend that you review and share it with those offices affected to ensure the justification are suitable to them meeting the mission of their organization, prior to moving this forward to RTP.

Additionally, we prepared responses for OP's actions and learned through Sharquita, who came up to assist us, that OP's management has been working on their own response to forward to RTP.

That following justifications apply to the nine actions:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.

Ex. 5 - Deliberative Process

Thanks.

Felicia A. Peppins, Program Analyst
U.S. Environmental Protection Agency

Office of the Administrator
Office of Administrative and Executive Services
1200 Pennsylvania Avenue, N.W.
Room 2432U WJC-North Mail Code 1104A
Washington, DC 20460
202-564-7428

Message

From: Twillman, Brian [Twillman.Brian@epa.gov]
Sent: 5/11/2017 10:24:54 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]; Lesperance, Twanna [Lesperance.Twanna@epa.gov]; Cuscino, Glen [Cuscino.Glen@epa.gov]
CC: Benton, Michael [benton.michael@epa.gov]; Twillman, Brian [Twillman.Brian@epa.gov]
Subject: Draft v1 - 16 May SOD Meeting Agenda and Slides
Attachments: DRAFT v1 - SOD Meeting Agenda 5-16-2017.docx; Draft Agenda v1 SOD Meeting 16 May 2017.pptx

These are on the G:Drive in the 2017 Meetings folder in the May 16 2017 sub-folder.

Please update.

Thanks.

- *Brian*

Message

From: Benton, Michael [benton.michael@epa.gov]
Sent: 5/24/2017 8:28:44 PM
To: Lesperance, Twanna [Lesperance.Twanna@epa.gov]; Allen, Reginald [Allen.Reginald@epa.gov]
Subject: RE: V-V Business Case Checklist April2017final.docx
Attachments: V-V Business Case Budget Impact estimate.docx

Reggie, as we discussed.

Michael

From: Lesperance, Twanna
Sent: Wednesday, May 24, 2017 10:32 AM
To: Benton, Michael <benton.michael@epa.gov>
Subject: V-V Business Case Checklist April2017final.docx

Hello Michael,

Heads up that we may need your assistance to address the budget part of the VV package. Please let me know when you will have time to discuss this with me. Reggie is trying to complete the package today.

Thanks,
Twanna

Message

From: Lesperance, Twanna [Lesperance.Twanna@epa.gov]
Sent: 5/24/2017 12:27:29 AM
To: Allen, Reginald [Allen.Reginald@epa.gov]
Subject: Draft Documents for AO VV Package
Attachments: AO Approved Targeted Positions Template-RA3.xlsx; VERA VISA Business Case 1.docx; VERA VISA ORG CHARTS - 05-2017.pptx

Hello Reggie,

Attached are the documents I worked on for the VV package.

1. The template was revised to include the remote positions and all totals at the bottom of the chart.
2. The business case was drafted in accordance to specific request/guidance for information. My draft response is identified using the red font. There is a budget portion that I was not able to address at the time.
3. Both the "Current" and the "Proposed" Charts are done. There are no changes between the two of them since there are no plans to reorganize at this time.

Hope this helps to get us to the finish line sooner.

Regards,
Twanna

*Twanna Lesperance, Assistant Director, AMS, PMO
Office of Administrative and Executive Services
Office of the Administrator, EPA
202-564-0419 (Desk)
lesperance.twanna@epa.gov*

Message

From: Reeder, John [Reeder.John@epa.gov]
Sent: 5/23/2017 3:19:38 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]
Subject: FW: Workforce Reshaping Summary information
Attachments: Copy of 05232017VERA VSIP Major Themes For Agency.xlsx

Importance: High

Lets discuss

From: Vizian, Donna
Sent: Tuesday, May 23, 2017 10:46 AM
To: 2017HQfirstassistants <2017HQfirstassistants@epa.gov>; 2017Regionfirstassistants <2017Regionfirstassistants@epa.gov>
Cc: Hart, Debbi <Hart.Debbi@epa.gov>; Gray, Linda <gray.linda@epa.gov>; Showman, John <Showman.John@epa.gov>; Carpenter, Wesley <Carpenter.Wesley@epa.gov>
Subject: Workforce Reshaping Summary information
Importance: High

Hi Everyone, First, please keep this close hold. I ask that you share by hard copy only to those helping you with this effort.

Attached is the result of the data collection on V/V plans. There are 2 summary charts. The "By Office" chart shows the percentage of offers accepted by NPM/Region. It ranges from a low of about **Ex. 5 - Deliberative Process** The second summary chart "EPA" provides the percentage by Theme. I have also included a tab for each office. We will talk about next steps at noon.

thanks

Printing Instructions: On the Excel Print Screen, chose Landscape Orientation and on the bottom drop down about scaling, Choose the fit on one page option. This will create small print but can be improved by removing the comment column from the print selection.

From: Vizian, Donna
Sent: Friday, May 12, 2017 3:57 PM
To: 2017HQfirstassistants <2017HQfirstassistants@epa.gov>; 2017Regionfirstassistants <2017Regionfirstassistants@epa.gov>
Cc: Hart, Debbi <Hart.Debbi@epa.gov>; Parker, Gary <parker.gary@epa.gov>; Hunt, Loretta <Hunt.Loretta@epa.gov>; Gray, Linda <gray.linda@epa.gov>; Carpenter, Wesley <Carpenter.Wesley@epa.gov>; DAA-Career <DAACareer@epa.gov>; DRA <DRA@epa.gov>; ARA <ARA@epa.gov>
Subject: Workforce Reshaping follow up

Hi Everyone,

Following up on our Wednesday conversation, we reviewed the themes and combined the restructuring of non-supervisory positions and restructuring of supervisory positions into one theme. I am attaching the table of the revised themes. There are now 6. Our next step is to estimate the number of positions in the pool and number of offers we would accept by theme and appropriation. If you have a position that crosses multiple appropriations, please indicate as such by using the "Across Multiple Appropriations" column along with

specific details in the “Comments” column. Please remember that this is an **estimate** to be used to show the potential outcome to the policy team. If the decision is to proceed, we will ask you to provide detailed information that will lead to your final number. Please complete the attached spreadsheet **by May 19th** and send it to Debbi Hart and me. Remember, you do not need to participate in every theme.

If we move to the implementation stage, the next step will be to complete a template for your office and identify positions in the pool. We will resend that information and Debbi will be available to assist your staff with completing the information. OARM would then use this information to develop one business case for the agency. We will also begin working on a communication plan should we get the green light to proceed.

Two other things: I am attaching FAQs for your information and below is information on “safe positions.”

OPM’s revised VSIP template addresses safe positions (attached, pg. 2, first paragraph):

The agency’s targeted population chart, “. . . may include additional categories of employees beyond those whose positions are directly targeted for elimination/restructuring (i.e., positions that are not the main focus for reduction/restructuring/elimination, but which are included in the VSIP offering only to the extent that they may provide a placement for an employee whose position will be reduced/restructured/eliminated.)

The “safe position” option assumes the employees who remain would meet the qualifications for the “safe” positions. “Safe positions” do not have to be restructured if vacated. OPM recognizes that VERA and VSIP are voluntary attrition authorities and that not every employee in a targeted position is able/wants to retire and/or resign. As with other federal workforce restructuring authorities (e.g., RIF), the agency has the ability to reassign employees to minimize the impact of its restructuring efforts.

The use of MP procedures would negate the purpose of designating a “safe position” since: the agency would be unable to limit the area of consideration to just employees whose positions were targeted for restructuring/elimination; and management has the right to select or not select from a group of certified eligibles. Also, it could be perceived V-V is being used to move people out in order to promote others.

Enjoy the weekend.

Donna

Message

From: Lesperance, Twanna [Lesperance.Twanna@epa.gov]
Sent: 4/27/2017 1:51:56 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]
CC: Benton, Michael [benton.michael@epa.gov]
Subject: Last VV package
Attachments: Workforce Analysis and Planning.docx; VERA- VSIP FAQ's - Revised 1-10-2013.doc; VERA VSIP Final Package (rev).rtf

Reggie,

In addition to VV info, I found the memo for the Workforce Analysis and Planning that may be helpful. I am conducting some analysis also that may be useful for providing data.

Thanks,
TWanna

*Twanna Lesperance, Assistant Director, AMS, PMO
Office of Administrative and Executive Services
Office of the Administrator, EPA
202-564-0419 (Desk)
lesperance.twanna@epa.gov*

Voluntary Early Retirement Authority (VERA) Voluntary Separation Incentive Payment (VSIP) FREQUENTLY ASKED QUESTIONS

Disclaimer: This is a non-technical summary of the OPM approved early-out/buyout authority for designated employees in EPA. The questions and answers are intended to provide very general information about this particular VERA/VSIP authority. You should not rely on this summary as a sole source of information. You should direct additional questions to your servicing Human Resources Shared Service Center.

GENERAL FAQ'S:

1. What positions have been approved for VERA and/or VSIP?

At this time the individual AA-ships and Regions have submitted individual proposals for VERA and VSIP authority to the Office of Personnel Management (OPM). At this time there have been no approvals from OPM. Upon approval each AA-Ship or Region will inform impacted staff.

2. I am not in one of the proposed eligible positions but work in an EPA office. Do I have a right to VERA and or VSIP?

No. A VERA and VSIP are not employee's right or entitlement. Management has the right to determine its organization and number of employees; therefore, agencies are **not** required to offer these incentives. VERA and VSIP are management tools used to help effectively reduce and reshape the workforce while providing eligible employees with an opportunity that may be attractive to them.

3. Are resignations, early-outs and buy-outs voluntary?

Yes. The decision to take advantage of these incentives is entirely voluntary on the part of eligible employees. No one is required to resign, accept an early retirement under VERA or a separation incentive under VSIP.

4. Can I be asked or forced to retire?

No. EPA management cannot ask or force you to retire. Managers are responsible for ensuring that employees are not coerced into either optional or early retirement.

5. Will my requested separation date be honored?

When determining separation dates, the Agency will consider the employee's preference and will attempt to honor it – to the extent allowable by the time limitations of the VERA/VSIP proposals. However, final decisions shall be based on the operational and budgetary needs of the organization.

6. When is the earliest I can leave and when is the latest?

The early-out/buyout application window and separation dates have been proposed in each AA-ship and Region's submission to OPM. Upon approval from OPM the AA-ship or Region will provide more specific information.

7. What happens if I change my mind and do not want to separate?

You may withdraw your application or separation paperwork at any time before you actually separate by written notification.

Important to Note: If you withdraw your application or separation paperwork, it is advisable to do so at least one pay period prior to the date you had planned to leave. Human Resources will input the buy-out payment into the payroll system prior to the effective date. Once this payment has processed through the payroll system H/R cannot stop it from occurring and it will be deposited into your account via direct deposit. You would be responsible for paying back the entire \$25K (the gross amount) to the agency and you would not be able to recover the taxes that were withheld from the payment until you file your 2014 income tax return.

Also note: If you accept a buyout in conjunction with your separation, you must pay back the incentive payment in full (the gross amount) to the EPA if you return to work for the Federal government within 5 years of your separation.

8. The law prohibits a Federal employee who takes the buy-out from entering into a personal service contract with the Federal government for 5 years. Does the same law apply if the separated Federal employee becomes a Federal grantee?

No. For example, you would not be subject to the 5-year Federal employment ban if you came back to work at EPA as a Senior Environmental Employment (SEE) Program enrollee. However, to avoid the appearance of impropriety, EPA discourages SEE grantees from enrolling retired or former EPA employees and placing them in their former position or one with similar duties. The SEE program requires a letter certifying that enrollees have not performed the same or similar duties during the previous twelve months.

VSIP (BUY-OUT) FAQ'S:

9. Am I eligible to receive a VSIP?

You are eligible for a buyout if you:

- Are serving in an approved position/employee category;
- Are serving in an appointment without time limitation; (See FAQ 10)
- Are currently employed by the Executive Branch of the Federal Government for a continuous period of at least 3 years;
- Apply during the application window, (See FAQ 6) and
- Separate by the date approved by OPM .

You are **not** eligible if you:

- Have been duly notified that you are to be involuntarily separated for misconduct or unacceptable performance,
- Are a reemployed annuitant,
- Are or would be eligible for disability retirement,
- Have previously received any voluntary separation incentive payment from the Federal Government,
- Are on transfer employment with another organization and covered by statutory reemployment rights, (this includes employees who are detailed or transferred to international organizations designated by the Dept. of State or other employees entitled to reemployment rights covered in Part 352 of the Code of Federal Regulations)
- Have performed service for which a student loan repayment benefit was or is to be paid during the 36-month period preceding the date of separation,
- Have performed service for which a recruitment or relocation bonus was or is to be paid during the 24-month period preceding the date of separation, or
- Have performed service for which a retention allowance was or is to be paid during the 12-month period preceding the date of separation.

10. What does an “appointment without time limitation” mean?

An employee on an appointment with a time limit works only until a specified “not-to-exceed” date. EPA sets the ending date when it hires such an individual and/or when it extends the appointment. For example, temporary and term employees serve with a time limit, so they are not eligible for an incentive payment. Career and career-conditional employees in the competitive service and permanent employees in the excepted service have no time limit so they are eligible. Employees serving on a temporary promotion or detail are eligible if their permanent position of record is in an approved category and they meet the other eligibility requirements.

11. What will be the amount of the VSIP?

Eligible employees accepting the VSIP will receive the lesser of two amounts:

- \$25,000 **OR**
- The equivalent of the amount that the employee would be entitled to receive under involuntary separation severance pay rules.

NOTE: For severance pay, an employee is entitled to one week of basic pay for each year of service up to the first 10 years, plus 2 weeks basic pay for each year of service beyond 10 years. In addition, an age adjustment allowance of 2.5% is added for each full quarter of a year that an employee is over 40 years of age. The maximum amount of severance pay is one year’s salary.

The MAXIMUM amount that EPA can pay for each buy-out is \$25,000 (gross). The net amount you receive will be LOWER after appropriate taxes, social security, and Medicare deductions are subtracted. A VSIP payment also can be garnished for child support, alimony, and debts.

12. How and when will I receive my VSIP payment?

You will receive the VSIP payment as a lump sum (less federal, state and local taxes, and FICA/Medicare taxes). EPA will make every attempt to provide you the VSIP payment as soon as possible after the date of your separation but cannot guarantee a specific date. However, past experience with these types of payments indicate that most often employees receive the VSIP payment at the same time as their last pay check.

13. Can I roll over my VSIP payment into an Individual Retirement Account (IRA) or into my Thrift Savings Plan (TSP) account?

No. Tax laws specify that a rollover into an IRA must come from a qualified retirement plan, and TSP contributions can only come from salary earnings. The VSIP is an incentive payment. It is not earned salary income.

14. Do I have to be eligible to retire in order to receive a VSIP?

No. If you are in one of the approved positions and you are not eligible to retire, you may resign and apply for the VSIP only.

15. Do I have to make a commitment to leave if I accept the VSIP payment?

Yes. You will need to sign an *Employee Buyout Agreement* stating that in exchange for an incentive payment you agree to resign or retire on a specific date approved by management.

RETIREMENT FAQ'S

16. Do I meet the age and service requirements to be eligible for optional, i.e. regular retirement?

For an optional retirement, you must meet one of the age and service requirements below on the date of separation:

CSRS Eligibility

- Age 62 with 5 years of service
- Age 60 with 20 years of service
- Age 55 with 30 years of service
- Age 50 with 20 years of service as a law enforcement officer

NOTE: You must be covered by CSRS for at least 1 year within the 2-year period immediately preceding the separation on which the annuity is based.

FERS Eligibility

- Age 62 with 5 years of service
- Age 60 with 20 years of service

- Minimum Retirement Age (MRA varies by birth year) with 30 years of service
- MRA with 10 years of service (with reduced annuity)

17. I am not eligible for *optional retirement* until after the application window closes. Does that mean that I will have to apply for an early-out in order to get the buyout?

No. You may list your optional retirement date on the application forms as your proposed separation date. Your separation date cannot be later than the separation date approved in the AA-ship or Region's VERA/VSIP package.

20. Am I eligible for a voluntary early retirement (VERA)?

You are eligible for a voluntary early retirement if you:

- Meet the minimum civilian service requirement which is 5 years of creditable civilian service.
- Meet the age and service requirements as of the date of separation:

(age 50 with 20 years of service **or** any age with 25 years of service)

- Separate from a position subject to CSRS or FERS coverage;
- Meet the "1-out-of-2" requirement (CSRS only); (See FAQ 22)
- Are serving in an appointment without time limitation;
- Are serving in an approved employee category;
- Have been employed continuously in EPA for at least 30 days before the date that EPA requested the early-out authority;
- Have not been duly notified that you are to be involuntarily separated for misconduct or unacceptable performance;
- Apply during the application window; and
- Separate by the close of the early-out period.

NOTE:

CSRS EMPLOYEES - If you are a CSRS employee who retires under the voluntary early retirement authority (VERA), your annuity will be reduced 2% for each year you are under age 55. (The reduction is 1/6 of 1 percent for each full month). This is a permanent reduction in your annuity.

FERS EMPLOYEES - There is no reduction in a FERS annuity if you retire under the age of 55.

FERS TRANSFEREES WITH A CSRS COMPONENT - If you are under the age of 55, the CSRS portion of your basic annuity is reduced by 1/6 of 1 percent for each full month (two percent a year), under the age of 55. The annuity rate on this portion of the annuity will not increase when you reach age 55. No reduction will be applied to the FERS portion of your annuity.

21. Can military service be used to meet the balance of service necessary for retirement?

If you are a CSRS employee with the minimum 5 years of creditable civilian service, creditable military service may be used to meet the balance of service necessary for retirement. Under FERS, post-1956 military service cannot be used to meet the service requirement unless you make the military deposit before retirement. Military deposits may not be deemed paid under alternative annuity provisions.

22. What is the "1 out of 2" requirement?

You must be covered by CSRS for at least 1 year within the 2-year period immediately preceding the separation on which the annuity is based. The 1 year of service does not have to be continuous. The year of service does, however, have to be service subject to CSRS deductions. An employee cannot meet the requirement by paying a deposit for non-deduction service.

23. If I retire, when will I begin receiving my annuity from OPM?

EPA will forward your retirement package to OPM immediately upon separation. Shortly after OPM receives your application for retirement, they will send you an acknowledgment and your retirement claim number (CSA#). If your records are complete, you will receive your first interim payment (usually between 75% and 80% of your regular monthly payment) approximately 7 to 14 days after you receive your acknowledgment letter. Depending on OPM's workload and other factors, it can take up to 2 to 3 weeks longer. OPM's goal is to complete the final adjudication of fully documented claims within 45 days from the date of receipt from EPA. **NOTE:** For voluntary retirements, CSRS annuities can begin on the first, second, or third day of the month. FERS, voluntary retirements begin only on the first day of a month.

24. Am I entitled to the FERS supplemental annuity payment if I retire early?

The supplemental annuity payment is payable when you reach your minimum retirement age under the FERS rules. i.e., if you retire at age 50, and your minimum retirement age under FERS is age 55, then you will not begin to receive the supplemental annuity payment from OPM until you turn age 55. If you have already reached your minimum retirement age at the time you separate, you will begin to receive the supplemental annuity immediately upon retirement. The supplemental annuity payment will continue until you reach age 62.

25. What tools are available and who should I contact to obtain a retirement annuity estimate?

Estimates are prepared by retirement specialists in your servicing HR Shared Service Center or you can use the online tool available at:

[HYPERLINK

"<https://fhrnavigator.com/frbweb/logon.do?operation=index&client=EPA>" \h]

26. Can I return to work for the Federal government if I retire and will I have to repay the VSIP?

Yes. If you retired from the federal government and are rehired, you would be a reemployed annuitant. This means that your annuity would continue and your new Federal salary would be offset by the amount of your annuity, unless the employing agency seeks and is granted a waiver of the salary offset by OPM.

An employee who receives a VSIP and later accepts employment for compensation with the Government of the United States within 5 years of the date of the separation on which the VSIP is based, including work under a personal services contract or other direct contract, must repay the entire amount of the VSIP to the agency that paid it – before the individual's first day of reemployment.

If the proposed employment is with an agency other than the General Account Office, the United States Postal Service, or the Postal Rate Commission, the Director of the Office of Personnel Management may, at the request of the head of the agency, waive the repayment if:

1. The proposed reemployment is with an executive branch agency;
2. The individual involved possesses unique abilities and is the only qualified applicant available for the position; or
3. In case of emergency involving a direct threat to life or property, the individual:
 - a. Has skills directly related to resolving the emergency; and
 - b. Will serve on a temporary basis only as long as the individual's services are made necessary by the emergency.

BENEFITS UPON SEPARATION FROM SERVICE FAQ'S

27. What happens to my unused annual and sick leave when I separate?

You will receive a lump sum payment for your unused annual leave.

Unused sick leave hours are converted to service credit and are included in the computation of your federal annuity. Unused sick leave hours do not count toward the number of years needed to retire. If you resign, you will not be compensated for sick leave hours, however, if you were to return to federal service, the sick leave hours would be restored.

28. Can I continue my Federal Employee's Group Life Insurance into retirement?

You may continue your Federal Employees Group Life Insurance (FEGLI), **if** you retire on an immediate annuity and if you have been enrolled in a FEGLI plan for the 5 years immediately preceding your retirement date or since your first opportunity to enroll. Otherwise, you may not continue it.

29. Can I continue my Federal Employee's Health Benefits into retirement?

Employees retiring in conjunction with a VERA or VSIP authority must have been covered under the FEHB program for the last 5 years of their Federal civilian service in order to continue such coverage in retirement, or if less than 5 years, for all service since the employee was first eligible for FEHB unless these requirements are waived.

OPM will grant pre-approved waivers to employees who have been:

1. Covered under the FEHB Program continuously since the beginning date of the agency's latest statutory VSIP authority, or OPM-approved VSIP or VERA authority; and
2. Retire during the statutory VSIP or OPM-approved VSIP/VERA period; and
3. Receive a VSIP, or
4. Take early optional retirement (i.e. VERA); or
5. Take discontinued service retirement based on an involuntary separation due to RIF, directed reassignment, reclassification to a lower grade, or abolishment of position.

30. Can I continue to be enrolled in the dental and vision plans, even if I've not been enrolled for the 5 years preceding my retirement or since my first opportunity to enroll?

Yes. Unlike FEHB law, there is no length of enrollment requirements to meet in order to continue enrollment into retirement.

31. Is there a benefits open season after retirement?

Yes. There is an open season every year. You can also make changes if you experience a qualifying life event (QLE).

32. Will my Federal Long Term Care (LTC) premiums increase because I'm retired?

No.

33. Will I be eligible to apply for LTC insurance after I retire?

Yes. Please call the Customer Service Center at Long Term Care Partners at 1-800-582-3337.

34. What do I need to do to have my LTC premiums deducted from my annuity?

Deductions will be withheld automatically from your annuity as you will indicate that you are enrolled on your retirement application.

35. What happens to my FSA if I separation or retire before the end of the Benefits Period?

Your HCFSAs (Health Care FSA) or LEX HCFSAs (Limited Expense HCFSAs) will terminate as of the date of your separation. There are no extensions. Any health care expenses incurred prior to the date of separation will still be reimbursable but those incurred after the date of separation will not. You can continue to use the remaining balance in your DCFSAs (Dependent Care FSAs) to pay for eligible dependent care until the end of the Benefit Period or until your account balance is used up, whichever comes first.

Message

From: McCluney, Lance [McCluney.Lance@epa.gov]
Sent: 1/10/2018 8:43:39 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]
Subject: FW: Proposed Approach to Managing AO FTE Levels - UPDATED AO PROPOSED STAFFING CHART
Attachments: AO PROPOSED STAFFING NEEDS - MASTER.XLSX; Summary of Impacts of reduced FTE levels.docx; AO - Managing FTE Levels (Revised 12-5-17) RR.docx

From: Allen, Reginald
Sent: Thursday, December 07, 2017 6:16 PM
To: Wooden-Aguilar, Helena <Wooden-Aguilar.Helena@epa.gov>
Cc: Lesperance, Twanna <Lesperance.Twanna@epa.gov>; McCluney, Lance <McCluney.Lance@epa.gov>
Subject: Proposed Approach to Managing AO FTE Levels - UPDATED AO PROPOSED STAFFING CHART

Helena

Here the final draft of the Managing AO FTE Levels letter for your review – I've also attached the last personnel status sheet and impact comments.

Reggie

Reginald E. Allen, SES
Assistant Deputy Chief of Staff
U.S. Environmental Protection Agency
Office 202-564-0444
Direct 202-564-1029
Cell Ex. 6 - Personal Privacy

Message

From: Cuscino, Glen [Cuscino.Glen@epa.gov]
Sent: 4/4/2017 3:41:46 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]; Reeder, John [Reeder.John@epa.gov]
Subject: Here are the wednesday afternoon documents updated with the OP changes
Attachments: OA_Major Issues.docx; OA_Program Activitiesrev.docx; OA_Eliminated Programs.docx

Message

From: Cuscino, Glen [Cuscino.Glen@epa.gov]
Sent: 4/4/2017 12:19:54 PM
To: Reeder, John [Reeder.John@epa.gov]; Allen, Reginald [Allen.Reginald@epa.gov]
Subject: Here is a current copy of our summary document for wednesday's meeting
Attachments: OA_Major Issues.docx

I was wondering, since OP's situation has now dramatically improved, if we need to mention them as one of our key issues.....

Message

From: Matluk, Lisa [Matluk.Lisa@epa.gov]
Sent: 2/28/2018 7:45:59 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]
Subject: Org Assessments
Attachments: 2017 Org Assessments - Attachment 1.pdf

Lisa Matluk
Program Analyst
Policy and Accountability Branch
Policy, Planning, and Training Division
Office of Human Resources
US EPA
202-564-2171
matluk.lisa@epa.gov

Message

From: Twillman, Brian [Twillman.Brian@epa.gov]
Sent: 4/25/2017 12:11:30 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]; Lesperance, Twanna [Lesperance.Twanna@epa.gov]; Cuscino, Glen [Cuscino.Glen@epa.gov]
CC: Benton, Michael [benton.michael@epa.gov]; Fraser, Scott [Fraser.Scott@epa.gov]
Subject: FW: SOD Meeting 25April17-Final.pptx
Attachments: SOD Meeting 25April17-Final.pptx; ATT00001.htm

I will go ahead and get the copies made.

From: Allen, Reginald
Sent: Monday, April 24, 2017 11:05 PM
To: Reeder, John <Reeder.John@epa.gov>; Lesperance, Twanna <Lesperance.Twanna@epa.gov>; Cuscino, Glen <Cuscino.Glen@epa.gov>; Twillman, Brian <Twillman.Brian@epa.gov>; Benton, Michael <benton.michael@epa.gov>
Subject: Fwd: SOD Meeting 25April17-Final.pptx

Final SOD slides - thanks for everyone help getting this done to standard.
Reggie

Reginald E. Allen, SES
Assistant Deputy Chief of Staff
U.S. Environmental Protection Agency
Office 202-564-0444
Direct 202-564-1029
Cell

Ex. 6

Message

From: Twillman, Brian [Twillman.Brian@epa.gov]
Sent: 4/24/2017 10:02:47 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]
CC: Cuscino, Glen [Cuscino.Glen@epa.gov]; Lesperance, Twanna [Lesperance.Twanna@epa.gov]; Fraser, Scott [Fraser.Scott@epa.gov]; Twillman, Brian [Twillman.Brian@epa.gov]; Benton, Michael [benton.michael@epa.gov]
Subject: Revised Draft v7 Slides for 25 April SOD/AA Meeting Plus Final Agenda You have just sent to the Meeting Participants
Attachments: SOD Meeting 25April17-Draft v7 Slides.pptx; Final SOD Meeting Agenda 4-25-2017.docx; OAES HR Info Talking Points.docx; 2017 AO TODASTWD Agenda.docx

Reggie – Following today's planning meeting, here is the revised slide deck representing input from Michael, Twanna, Scott, and me.

It is the latest version. Please review and alter as desired. We will make copies in the morning.

Also, I will be updating the Suggested Talking Points for Twanna (per a couple of suggestions from Scott) and will look to provide more specifics about Maxiflex. I will reach out to LERS about when they expect to have the recorded versions of the training sessions for managers and employees available.

Also, if there are any other materials to prepare as handouts, get these to me and I will ensure copies are made and folders are prepared.

I am attaching the agenda for Thursday's AO Take Our Daughters and Sons to Work Day Event.

Regards to all!

- Brian

Message

From: Twillman, Brian [Twillman.Brian@epa.gov]
Sent: 4/21/2017 8:57:34 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]; Lesperance, Twanna [Lesperance.Twanna@epa.gov]; Cuscino, Glen [Cuscino.Glen@epa.gov]
CC: Benton, Michael [benton.michael@epa.gov]; Fraser, Scott [Fraser.Scott@epa.gov]; Twillman, Brian [Twillman.Brian@epa.gov]
Subject: FW: LATEST DRAFT of SOD Meeting Agenda and Slides
Attachments: SOD Meeting Agenda 4-25-2017 - Draft version 4.docx; SOD Meeting 25April17-Draft v4 Slides.pptx

Michael and I talked and he is going to add some revised slides for the last two agenda items (Workforce Reshaping Initiative and VERA/VSIP)....either later today or early Monday...also, we are working on talking points, etc.....so, we are getting closer to what we want to have in place for our 2 pm meeting on Monday.

The documents can be found on the G:Drive in the SOD Meetings folder and the 2017 Meetings/April 25 2017 subfolder.

Enjoy the weekend!!

- Brian

From: Twillman, Brian
Sent: Friday, April 21, 2017 3:03 PM
To: Cuscino, Glen <Cuscino.Glen@epa.gov>; Lesperance, Twanna <Lesperance.Twanna@epa.gov>; Benton, Michael <benton.michael@epa.gov>
Cc: Twillman, Brian <Twillman.Brian@epa.gov>
Subject: LATEST DRAFT of SOD Meeting Agenda and Slides

Here are the latest DRAFTS to change/alter, etc. Please send/or make changes by COB today.

Thanks!

- Brian

Message

From: Lesperance, Twanna [Lesperance.Twanna@epa.gov]
Sent: 6/16/2017 10:05:40 PM
To: Schulman, Marvin [Schulman.Marvin@epa.gov]
CC: Allen, Reginald [Allen.Reginald@epa.gov]; McCluney, Lance [McCluney.Lance@epa.gov]
Subject: AO VERA VISA Business Case 2 FINAL Numbers.docx
Attachments: AO VERA VISA Business Case 2 FINAL.docx

Message

From: Twillman, Brian [Twillman.Brian@epa.gov]
Sent: 6/15/2017 9:37:32 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]; McCluney, Lance [McCluney.Lance@epa.gov]; Lesperance, Twanna [Lesperance.Twanna@epa.gov]
CC: Benton, Michael [benton.michael@epa.gov]
Subject: FW: FY18 House Budget Hearing - EPA's Workforce

FYI -

From: Hammer, George
Sent: Thursday, June 15, 2017 3:38 PM
Subject: FY18 House Budget Hearing - EPA's Workforce

I was able to see the House Subcommittee for Interior, Environment, and Related Agencies FY18 budget hearing today. In response to two separate questions regarding EPA's workforce, the Administrator mentioned that EPA is anticipating that if the President's budget is passed as proposed, and which sounded unlikely (one Congressman mentioned that this might be the first time in years when an Agency receives more than it requested), that potential workforce reductions would be managed through:

- The Hiring Freeze,
- The forthcoming Early-Out/Buy-Out, and
- Attrition (with 20% of EPA's workforce projected to be retirement eligible over the next 3-5 years).

Message

From: Twillman, Brian [Twillman.Brian@epa.gov]
Sent: 5/16/2017 8:12:24 PM
To: Benjamin-Sirmons, Denise [Benjamin-Sirmons.Denise@epa.gov]; Rogers, JoanB [Rogers.JoanB@epa.gov]
CC: Allen, Reginald [Allen.Reginald@epa.gov]; Lesperance, Twanna [Lesperance.Twanna@epa.gov]; Cuscino, Glen [Cuscino.Glen@epa.gov]
Subject: FW: Final SOD Meeting Slides and Agenda for May 16, 2017
Attachments: SOD Meeting Final Agenda 5-16-2017.docx; Final SOD Meeting 16 May 2017.pptx

Denise and Joan – Here is the agenda along with the set of slides that were discussed at today's SOD Meeting.

Also, I am bringing each of you a set of the hard-copy handouts. I will be upstairs shortly.

If you have any questions, please let us know.

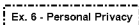
Regards!



Brian M. Twillman, MS-ABS - Training Coordinator and Organization Development Specialist

"Service First, People Always." US EPA | Office of the Administrator | Office of Administrative and Executive Services (OAES)

WJC North | Rm 2432-Y | Mail-Code 1104-A 1200 Pennsylvania Avenue, NW, WDC 20460

202.564.5948 phone | 202.564.2744 fax |  EPA iPhone

EPA eLearning: <http://epa.skillport.com/>

HQ's OHR Site: <http://intranet.epa.gov/hrtraining/>

EPA University's List of Mandatory Training: <http://workplace.epa.gov/training.html>

[AO Sharepoint Site](#)

"Live so that when others think of compassion, honesty and integrity, they think of you..." – Unknown

"Life is perpetual instruction in cause and effect." – Ralph Waldo Emerson

Message

From: Twillman, Brian [Twillman.Brian@epa.gov]
Sent: 4/20/2017 4:53:32 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]; Lesperance, Twanna [Lesperance.Twanna@epa.gov]; Cuscino, Glen [Cuscino.Glen@epa.gov]; Fraser, Scott [Fraser.Scott@epa.gov]
CC: Twillman, Brian [Twillman.Brian@epa.gov]
Subject: DRAFT APRIL 25 SOD/AA Meeting Agenda and Slides for Today's Planning Meeting
Attachments: SOD Meeting Agenda 4-25-2017 - Draft v3.docx; SOD Meeting 25April17-Draft v3 Slides.pptx

Please take a look at these docs.

I am in a meeting with the Office of Environmental Education until 2 p.m.

If there are more changes to make, just let me know.

Otherwise, I will bring copies of these documents to our 3 p.m. meeting.

- *Brian*

Message

From: Lesperance, Twanna [Lesperance.Twanna@epa.gov]
Sent: 4/20/2017 12:34:31 AM
To: Twillman, Brian [Twillman.Brian@epa.gov]
CC: Benton, Michael [benton.michael@epa.gov]; Allen, Reginald [Allen.Reginald@epa.gov]
Subject: Reshaping Workforce
Attachments: BEYOND THE FEDERAL HIRING FREEZE.pptx; VERA-VSIP Overview Presentation April2017.pptx

Brian,

Attached is my first draft of slides for the SOD meeting. I am including also the PowerPoint OARM used when briefing the senior managers.

Michael & Reggie,

This email is the 2nd of the two I mentioned I would send you.

I look forward to our discussion tomorrow.

*Twanna Lesperance, Assistant Director, AMS, PMO
Office of Administrative and Executive Services
Office of the Administrator, EPA
202-564-0419 (Desk)
lesperance.twanna@epa.gov*



Voluntary Early Retirement and Voluntary Separation Incentive Authorities

April 2017



What is Voluntary Early Retirement Authority ?

VERA (or Early-Out) allows agencies that are undergoing substantial restructuring, reshaping, downsizing, transfer of function or reorganization to temporarily lower the age and service requirements in order to increase the number of employees who are eligible for retirement.

- Encourages voluntary separations and helps the agency complete the needed organizational change with minimal disruption to the work force.
- Eligible employees receive an immediate annuity years before they would be otherwise eligible.
- Use of the authority requires OPM approval.



VERA Eligibility

The employee must:

- Meet the minimum age and service requirements and be:
 - At least age 50 with at least 20 years of creditable federal service, or
 - Any age with at least 25 years of creditable federal service;
- Have served in a position covered by the OPM authorization for the minimum time specified by OPM (usually 30 days prior to the date of the agency request);
- Serve in a position targeted by the agency's VERA plan; and
- Separate by the close of the early-out period.



What is Voluntary Separation Incentive Payment?

VSIP (or Buy-Out) allows agencies that are downsizing or restructuring to offer employees lump-sum payments up to \$25,000 as an incentive to voluntarily separate.

- May be offered to employees who are in surplus positions or have skills that are no longer needed in the workforce and who volunteer to separate by resignation, optional retirement or by voluntary early retirement.
- Some employees may be eligible for VERA and VSIP and can take both (i.e., retire early with a lump-sum incentive).
- Use of the authority requires OPM approval.



VSIP Eligibility

The employee must:

- Be serving in an appointment without time limit;
- Be currently employed by the executive branch of the federal government for a continuous period of at least 3 years;
- Be serving in a position covered by the agency VSIP plan (i.e., in the specific geographic area, organization, series and grade); and
- Apply for and receive VSIP approval.



VSIP Ineligible

- Reemployed annuitants;
- Eligible for disability retirement;
- Have received a decision notice of involuntary separation for misconduct or poor performance;
- Previously received any VSIP from the federal government;
- Recipient of a student loan repayment during the 36-month period preceding the date of separation;
- Recipient of a recruitment or relocation incentive during the 24-month period preceding the date of separation; and
- Recipient of a retention incentive during the 12-month period preceding the date of separation.



VERA and VSIP ARE NOT

- A short-term solution for budget cuts; the focus of your business case should be on addressing shifts in agency priorities.
- For positions that have direct hire authority or are paying recruitment incentives, e.g. IT Specialist (Information Security).
- To be used to deal with employees with performance or conduct issues.

[DateTime]

7



JUSTIFICATIONS MUST INCLUDE:

- Detailed summary of how the authorities will be used and the anticipated results.
- An explanation why the requested incentive(s) are an appropriate strategy for making the required workforce adjustments.
- The total number of employees expected to be affected and expected to take advantage of the incentive(s).
- Anticipated budget impact, i.e., direct costs and estimated savings
- Detailed list of positions that will be impacted and offered the incentive(s) identified by organizational unit, geographical location, occupational category, grade level and any other relevant factors.
- An explanation of how the organization will operate without the eliminated positions.
- Current and proposed organizational charts.

[DateTime]

8



THINGS TO REMEMBER

- Use the instructions in the VERA/VSIP Checklist to develop your office's business case.
- Populate the Targeted Positions Excel template provided by OHR.
- Have a plan and be specific.
- Link justification to workforce and succession plans.
- If addressing "strategic goals" explain what those are.
- Don't use phrases that target age such as "maturing workforce."
- No requirement to request both VERA and VSIP.

[DateTime]

9



TARGETING POSITIONS

- Target positions, not employees.
- Do not target critical positions, required positions (e.g., Budget Officer) or direct hire positions (IT Security, Contract Specialists).
 - SES positions will require additional information (e.g., does the agency plan to return the slot?)
- Targeted positions must be restructured (different grade, series, duties) or eliminated if vacated via VERA/VSIP;
 - If the targeted position must remain in the same series and FPL, OPM will request current and proposed PDs and additional information to confirm restructure.
- Can't target positions for the sole purpose of providing promotional opportunities to remaining staff.



THE PROCESS

- In contrast to 2104/15 VERA/VSIP efforts, EPA will submit only one, agency-level VERA/VSIP business case proposal.
- Program/Region completes Targeted Positions Template and abbreviated, two-page business case based on parameters delineated in V/V Checklist. Office submissions will be compiled by OHR into one OMB/OPM submission.
- Offices submit draft to OARM/OHR for review and feedback.
- Informal review of agency-level proposal by OPM and OMB.
- Submit package for Acting AA of OARM's approval and signature.
- Submit officially to OPM and OMB.
- Receive Approval.



OHR CONTACTS

Debbi Hart

hart.debbi@epa.gov

202-564-2011

Loretta Hunt

hunt.loretta@epa.gov

202-564-6963

Message

From: Quarles, Michael [Quarles.Michael@epa.gov]
Sent: 5/16/2017 12:50:42 PM
To: Twillman, Brian [Twillman.Brian@epa.gov]; Allen, Reginald [Allen.Reginald@epa.gov]; Lesperance, Twanna [Lesperance.Twanna@epa.gov]; Benton, Michael [benton.michael@epa.gov]; Cuscino, Glen [Cuscino.Glen@epa.gov]
Subject: RE: SOD Slides for today
Attachments: Final SOD Meeting 16 May 2017.pptx; 2017 05 03 AO Active CORs.xlsx

Hi Brian,

Please see minor changes to slides and I have added the COR list for printing.

Have a great day,

Michael G. Quarles
Grants and Contracts Coordinator
Office of Administrative and Executive Services
US Environmental Protection Agency
1200 Pennsylvania Ave. NW
Washington, DC 20460
Mail Code 6202A

Ex. 6

From: Twillman, Brian
Sent: Tuesday, May 16, 2017 8:12 AM
To: Allen, Reginald <Allen.Reginald@epa.gov>; Lesperance, Twanna <Lesperance.Twanna@epa.gov>; Benton, Michael <benton.michael@epa.gov>; Quarles, Michael <Quarles.Michael@epa.gov>; Cuscino, Glen <Cuscino.Glen@epa.gov>; Twillman, Brian <Twillman.Brian@epa.gov>
Subject: FW: SOD Slides for today

Hello Everyone – I made two minor changes on the Agenda (getting rid of V1 and changing 'OA' to 'AO'also, Michael Quarles is in the process of making some minor edits to the slides)....see Final Agenda.

From: Allen, Reginald
Sent: Monday, May 15, 2017 11:32 PM
To: Twillman, Brian <Twillman.Brian@epa.gov>
Cc: Lesperance, Twanna <Lesperance.Twanna@epa.gov>; Benton, Michael <benton.michael@epa.gov>; Cuscino, Glen <Cuscino.Glen@epa.gov>; Quarles, Michael <Quarles.Michael@epa.gov>
Subject: SOD Slides for tomorrow

Brian
Final for distro

Many small changes and edits

- Glen/Michael B – added back in the slides on close out as a reminder (can go through these quickly)
- Michael Q – Review my changes

Thanks
Reggie

Reginald E. Allen

Director, Administrative and Executive Services

Office of the Administrator

U.S. Environmental Protection Agency

Office 202-564-0444

Direct 202-564-1029

Cell

Ex. 6

Message

From: Twillman, Brian [Twillman.Brian@epa.gov]
Sent: 6/13/2017 2:02:10 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]; McCluney, Lance [McCluney.Lance@epa.gov]; Lesperance, Twanna [Lesperance.Twanna@epa.gov]; Twillman, Brian [Twillman.Brian@epa.gov]; Fraser, Scott [Fraser.Scott@epa.gov]; Eng, Connie [Eng.Connie@epa.gov]
Subject: Final SOD/AA Huddle Agenda and Slides
Attachments: Maxiflex-FAQ-5-12-2017.pdf; Agenda SOD Meeting 6-13-2017.docx; SOD Huddle Final 13 June 2017.pptx

Hello Everyone – Here is the final agenda and the final set of slides. I have added updated info about the FEVS to slides 15 and 16 and have (in lieu of having it as a handout) the chart which shows the latest 2017 FEVS response numbers and response rates for AO and our sub-offices as of 8 a.m. this morning.

To supplement the Maxiflex presentation that is to be given by Lindsey Johnson, we will bring copies of the Maxiflex Q & A's.....(even though this was a handout at the May SOD meeting)....

- Brian

Message

From: Lesperance, Twanna [Lesperance.Twanna@epa.gov]
Sent: 4/20/2017 12:12:55 AM
To: Benton, Michael [benton.michael@epa.gov]
CC: Allen, Reginald [Allen.Reginald@epa.gov]
Subject: FW: VV DOCUMENTS - 1 of 2 Informational Emails
Attachments: VERA- VSIP FAQ's - Revised 1-10-2013.doc; VERA VSIP Final Package (rev).rtf; VERA VSIP Final Package 12-23-13 (rev).rtf; VERA.VSIP chart.xlsx; VERA.VSIPAttachment A.1.docx; VERA.VSIPAttachment A.docx; VERA.VSIPAttachment B.docx; VERA.VSIPAttachment C.docx; VERA.VSIPAttachment D.docx; VERA.VSIPschedule.docx; VERA-VSIP AO Opportunities Announcement Feb12 2014.FinalAttachment.docx; VERA-VSIP AO Opportunities Announcement Final 12 Feb 2014.docx; VERA-VSIP Opportunities Announcement with Instructions for RTP customers Final 11 Feb 2014.docx; VERA-VSIP Request from AO -Final 12-23-13.doc; VERA-VSIP Steps 10 22 13.DB.docx

Hello Michael,

Per instruction from Reggie, I am forwarding you information and documents prepared for the last round of the VV. For the most part, we can probably use a lot of the same language; however, this time, the request will be handled agency-wide. Last time, and I suspect this time as well, AO used the following authorities:

- Reshape its workforce to reflect changes in programmatic direction, strengthen technical programmatic expertise with the appropriate skill mix and reduce administrative support positions through efficiencies and technology;
- Reshape AO's workforce, recognizing the need for new skills in key areas of AO as well as the need to accelerate Next Generation communications and technology, collaboration and community outreach skills and abilities;
- Create hiring opportunities to correct significant competency gaps by creating a limited number of vacancies to recruit new staff with critical knowledge, skills and abilities to create a higher-performing organization;
- Reduce and rebalance the current top-heavy GS-14/15 grade structure to create backfill opportunities for recruiting at lower grade levels;
- Implement a strategic workforce succession plan to ensure mission critical positions are filled; and
- Assist in reaching lower FTE ceilings and controlling escalating payroll costs.

You can read more details on information in word document entitled VV Request From AO – Final 12-23-13 – middle document in the last row.

FYI, Sandra is making printed copies of this information for both of us.

Twanna Lesperance, Assistant Director, AMS, PMO
Office of Administrative and Executive Services
Office of the Administrator, EPA
202-564-0419 (Desk)
lesperance.twanna@epa.gov

Message

From: Reginald E Allen [Ex. 6 - Personal Privacy]
Sent: 6/13/2017 12:54:07 AM
To: Allen, Reginald [Allen.Reginald@epa.gov]
Subject: SOD Huddle Final 13 June 2017.pptx
Attachments: SOD Huddle Final 13 June 2017.pptx

Message

From: Twillman, Brian [Twillman.Brian@epa.gov]
Sent: 6/12/2017 12:54:53 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]; Lesperance, Twanna [Lesperance.Twanna@epa.gov]; McCluney, Lance [McCluney.Lance@epa.gov]; Benton, Michael [benton.michael@epa.gov]; Twillman, Brian [Twillman.Brian@epa.gov]; Eng, Connie [Eng.Connle@epa.gov]
Subject: FW: Proposed Agenda and Slides (Version 2 of Each) - June 13 SOD/AA Huddle
Attachments: Proposed Agenda v2 SOD Meeting 6-13-2017.docx; v2 Proposed Slides SOD Meeting 13 June 2017.pptx

Hello Everyone – Please see v2 of the Proposed Slides. I have added the suggested slides sent by Twanna and by Lance.

Ex. 5 - Deliberative Process

- Brian

From: Twillman, Brian
Sent: Thursday, June 08, 2017 6:31 PM
To: Allen, Reginald <Allen.Reginald@epa.gov>; McCluney, Lance <McCluney.Lance@epa.gov>; Lesperance, Twanna <Lesperance.Twanna@epa.gov>; Benton, Michael <benton.michael@epa.gov>; Eng, Connie <Eng.Connle@epa.gov>; Fraser, Scott <Fraser.Scott@epa.gov>; Twillman, Brian <Twillman.Brian@epa.gov>
Subject: PROPOSED SLIDES NOW INCLUDED with Proposed Agenda v2 - June 13 SOD/AA Huddle

Hello Everyone – I have just gone ahead and have prepared this set of draft slides for Tuesday's SOD Meeting. These are located on the G:Drive.

We can build off of these.

My weekend begins now.

Have a good day tomorrow and a very good weekend.

Regards!

- Brian

From: Twillman, Brian
Sent: Thursday, June 08, 2017 5:40 PM
To: Allen, Reginald <Allen.Reginald@epa.gov>; McCluney, Lance <McCluney.Lance@epa.gov>; Lesperance, Twanna <Lesperance.Twanna@epa.gov>; Benton, Michael <benton.michael@epa.gov>; Eng, Connie <Eng.Connle@epa.gov>; Fraser, Scott <Fraser.Scott@epa.gov>; Twillman, Brian <Twillman.Brian@epa.gov>
Subject: UPDATED: Proposed Agenda v2 - June 13 SOD/AA Huddle

Hello Everyone - Reggie met with Connie and I today and we have revised the proposed agenda. Here is the updated version.

Ex. 5 - Deliberative Process

If you have any comments or additional changes to make, please send these to everyone. If necessary, Connie will make changes so Reggie can send out a head's up announcement to the SOD's which includes an updated (nearly final if not final) agenda.

Both Michael Benton and I are out of the office tomorrow. Have a good day tomorrow and a good weekend.

The agenda can be found on the G:Drive in the SOD Meetings folder and the FY 2017/June 13 2017 sub-folders.

Regards to All!

- Brian

Message

From: Lesperance, Twanna [Lesperance.Twanna@epa.gov]
Sent: 6/10/2017 1:02:59 AM
To: Allen, Reginald [Allen.Reginald@epa.gov]; McCluney, Lance [McCluney.Lance@epa.gov]; Eng, Connie [Eng.Connie@epa.gov]
CC: Twillman, Brian [Twillman.Brian@epa.gov]; Fraser, Scott [Fraser.Scott@epa.gov]
Subject: RE: PROPOSED SLIDES NOW INCLUDED with Proposed Agenda v2 - June 13 SOD/AA Huddle
Attachments: Proposed Slides v1 SOD Meeting 13 June 2017.pptx; AMS SLIDES FOR SOD - 6-13-17.pptx

Reggie,

I took a shot at the developing/update slides for AMS. Some of the updates are shown in red in the first set of slides. The AMS/HR specific slides are in the second set. Hope this helps.

Have a good weekend and I will see you on Tuesday.

*Twanna Lesperance, Assistant Director, AMS, PMO
Office of Administrative and Executive Services
Office of the Administrator, EPA
202-564-0419 (Desk)
lesperance.twanna@epa.gov*

From: Twillman, Brian
Sent: Thursday, June 08, 2017 6:31 PM
To: Allen, Reginald <Allen.Reginald@epa.gov>; McCluney, Lance <McCluney.Lance@epa.gov>; Lesperance, Twanna <Lesperance.Twanna@epa.gov>; Benton, Michael <benton.michael@epa.gov>; Eng, Connie <Eng.Connie@epa.gov>; Fraser, Scott <Fraser.Scott@epa.gov>; Twillman, Brian <Twillman.Brian@epa.gov>
Subject: PROPOSED SLIDES NOW INCLUDED with Proposed Agenda v2 - June 13 SOD/AA Huddle

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Regards!

- Brian

From: Twillman, Brian
Sent: Thursday, June 08, 2017 5:40 PM
To: Allen, Reginald <Allen.Reginald@epa.gov>; McCluney, Lance <McCluney.Lance@epa.gov>; Lesperance, Twanna <Lesperance.Twanna@epa.gov>; Benton, Michael <benton.michael@epa.gov>; Eng, Connie <Eng.Connie@epa.gov>; Fraser, Scott <Fraser.Scott@epa.gov>; Twillman, Brian <Twillman.Brian@epa.gov>
Subject: UPDATED: Proposed Agenda v2 - June 13 SOD/AA Huddle

Hello Everyone - Reggie met with Connie and I today and we have revised the proposed agenda. Here is the updated version.

Ex. 5 - Deliberative Process

If you have any comments or additional changes to make, please send these to everyone. If necessary, Connie will make changes so Reggie can send out a head's up announcement to the SOD's which includes an updated (nearly final if not final) agenda.

Both Michael Benton and I are out of the office tomorrow. Have a good day tomorrow and a good weekend.

The agenda can be found on the G:Drive in the SOD Meetings folder and the FY 2017/June 13 2017 sub-folders.

Regards to All!

- Brian

Message

From: Twillman, Brian [Twillman.Brian@epa.gov]
Sent: 6/8/2017 10:31:06 PM
To: Allen, Reginald [Allen.Reginald@epa.gov]; McCluney, Lance [McCluney.Lance@epa.gov]; Lesperance, Twanna [Lesperance.Twanna@epa.gov]; Benton, Michael [benton.michael@epa.gov]; Eng, Connie [Eng.Connie@epa.gov]; Fraser, Scott [Fraser.Scott@epa.gov]; Twillman, Brian [Twillman.Brian@epa.gov]
Subject: PROPOSED SLIDES NOW INCLUDED with Proposed Agenda v2 - June 13 SOD/AA Huddle
Attachments: Proposed Agenda v2 SOD Meeting 6-13-2017.docx; Proposed Slides v1 SOD Meeting 13 June 2017.pptx

Hello Everyone – I have just gone ahead and have prepared this set of draft slides for Tuesday's SOD Meeting. These are located on the G:Drive.

We can build off of these.

My weekend begins now.

Have a good day tomorrow and a very good weekend.

Regards!

- Brian

From: Twillman, Brian
Sent: Thursday, June 08, 2017 5:40 PM
To: Allen, Reginald <Allen.Reginald@epa.gov>; McCluney, Lance <McCluney.Lance@epa.gov>; Lesperance, Twanna <Lesperance.Twanna@epa.gov>; Benton, Michael <benton.michael@epa.gov>; Eng, Connie <Eng.Connie@epa.gov>; Fraser, Scott <Fraser.Scott@epa.gov>; Twillman, Brian <Twillman.Brian@epa.gov>
Subject: UPDATED: Proposed Agenda v2 - June 13 SOD/AA Huddle

Hello Everyone - Reggie met with Connie and I today and we have revised the proposed agenda. Here is the updated version.

- I spoke with Lindsey Johnson, AO's LER Specialist, and she is planning to attend and will briefly discuss the latest news associated with Maxiflex and a possible extension due to the Metro SafeTrack program. In addition, she will provide a slide or two that will cover key points that our senior leaders need to know.
- Lance and Michael are in the process of preparing several Budget slides and we can work on the HR information slides on Monday morning. Also, I am preparing a handout and 1-2 slides on the Proposed AO Career Development Initiative for FY 2017-2018.
- Per John, Reggie is adding Talent Hub as an agenda item. I have added it to the Continued Business section.
- In the new business section of this agenda, there are several questions that may be important to ask and discuss...while I have added these to the agenda, we could easily move these into the slide deck.

If you have any comments or additional changes to make, please send these to everyone. If necessary, Connie will make changes so Reggie can send out a head's up announcement to the SOD's which includes an updated (nearly final if not final) agenda.

Both Michael Benton and I are out of the office tomorrow. Have a good day tomorrow and a good weekend.

The agenda can be found on the G:Drive in the SOD Meetings folder and the FY 2017/June 13 2017 sub-folders.

Regards to All!

- Brian

Message

From: Allen, Reginald [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=799C3B0558E14130B17C66B2533548BA-ALLEN, REGI]
Sent: 11/28/2017 2:04:55 PM
To: McCluney, Lance [McCluney.Lance@epa.gov]
Subject: Fwd: FTE exercise
Attachments: Managing FTE Levels - AO.docx; ATT00001.htm

Reginald E. Allen, SES
Assistant Deputy Chief of Staff
U.S. Environmental Protection Agency
Office 202-564-0444
Direct 202-564-1029
Cell Ex. 6 - Personal Privacy

Begin forwarded message:

From: "Allen, Reginald" <Allen.Reginald@epa.gov>
Date: November 27, 2017 at 5:46:23 PM EST
To: "Wooden-Aguilar, Helena" <Wooden-Aguilar.Helena@epa.gov>
Cc: "McCluney, Lance" <McCluney.Lance@epa.gov>, "Lesperance, Twanna" <Lesperance.Twanna@epa.gov>
Subject: RE: FTE exercise

As requested

Reginald E. Allen, SES
Assistant Deputy Chief of Staff
U.S. Environmental Protection Agency
Office 202-564-0444
Direct 202-564-1029
Cell Ex. 6 - Personal Privacy

From: Wooden-Aguilar, Helena
Sent: Monday, November 27, 2017 5:44 PM
To: Allen, Reginald <Allen.Reginald@epa.gov>
Cc: McCluney, Lance <McCluney.Lance@epa.gov>; Lesperance, Twanna <Lesperance.Twanna@epa.gov>
Subject: FTE exercise

Thanks for meeting today and I appreciate all the work you and your staff have done. If you could please send me the one pager you shared electronically to me this evening that would be great and I look forward to getting the remaining information by tomorrow 10 AM thanks again
Helena

Helena Wooden-Aguilar
Acting Deputy Chief of Staff
Office of the Administrator
U.S. Environmental Protection Agency
202-564-0792 (office)

Ex. 6 - Personal Privacy (mobile)
wooden-aguilar.helena@epa.gov

Message

From: Allen, Reginald [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=799C3B0558E14130B17C66B2533548BA-ALLEN, REGI]
Sent: 10/28/2017 11:38:40 PM
To: Fraser, Scott [Fraser.Scott@epa.gov]; Lesperance, Twanna [Lesperance.Twanna@epa.gov]; McCluney, Lance [McCluney.Lance@epa.gov]
CC: Smoot, Nicole [Smoot.Nicole@epa.gov]; Benton, Michael [benton.michael@epa.gov]
Subject: RE: Revised briefing for DCoS
Attachments: OAES and IO Overview for incoming Deputy Chief of Staff draft v3.pptx; OAES Vision Mission Values Goals.docx

Team

Did some work on these – more needed, must finalize by 4pm Monday – blocked 3-4 Monday to do final review.

Please work early Monday.

Thanks
Reggie

Reginald E. Allen
Acting Deputy Chief of Staff
U.S. Environmental Protection Agency
Office 202-564-0444
Direct 202-564-1029
Cell: Ex. 6 - Personal Privacy

From: Fraser, Scott
Sent: Friday, October 27, 2017 6:49 PM
To: Allen, Reginald <Allen.Reginald@epa.gov>; Lesperance, Twanna <Lesperance.Twanna@epa.gov>; McCluney, Lance <McCluney.Lance@epa.gov>
Cc: Smoot, Nicole <Smoot.Nicole@epa.gov>; Benton, Michael <benton.michael@epa.gov>
Subject: Revised briefing for DCoS

Team,

Please see attached draft slide deck that covers the edits and placeholders discussed, including the pie charts below.

I've also included a one-pager of the Vision, Mission, Values, Goals info previously covered in the slides.

Wishing you a relaxing weekend!

Scott W. Fraser

Deputy Director, Office of Public Engagement

On detail to Office of Administrative and Executive Services
Office of the Administrator | U.S. Environmental Protection Agency | Tel 202-566-2126 |
fraser.scott@epa.gov

EPA employees, please check out [Talent Hub](#), watch the [video](#), and update your profile in [My Stuff](#).

From: Lesperance, Twanna

Sent: Friday, October 27, 2017 5:54 PM

To: McCluney, Lance <McCluney.Lance@epa.gov>

Cc: Allen, Reginald <Allen.Reginald@epa.gov>; Fraser, Scott <Fraser.Scott@epa.gov>; Smoot, Nicole <Smoot.Nicole@epa.gov>

Subject: Request for PIE Charts

Hello Lance,

If time permits, Reggie wants to add the following Pie Charts to the presentation for Helena:

Ex. 5 - Deliberative Process

Thanks,
Twanna


*Twanna Lesperance, Assistant Director, AMS, PMO
Office of Administrative and Executive Services
Office of the Administrator, EPA
202-564-0419 (Desk)
lesperance.twanna@epa.gov*

Message

From: Standifer, Juanita [Standifer.Juanita@epa.gov]
Sent: 1/3/2018 10:21:45 PM
To: Simon, Harvey [Simon.Harvey@epa.gov]; Larsen, Elena [Larsen.Elena@epa.gov]; Jones-Parra, Lisa [Jones-Parra.Lisa@epa.gov]; Grogard, Megan [Grogard.Megan@epa.gov]
CC: Maher, Karen [Maher.Karen@epa.gov]; Braxton, Marilyn [Braxton.Marilyn@epa.gov]
Subject: OEI FY 2018 Interim FTE Target
Attachments: OEI Managing FTE Levels_draft 11-22-17.docx

<!--[if lte mso 15 || CheckWebRef]-->

Standifer, Juanita has shared OneDrive for Business files with you. To view them, click the links below.

 2018 Interim FTE Target.xlsxm

 OEI Positions and FTE UPDATE November 2017.xlsx

<!--[endif]-->

Hi Harvey,

FYI - We just received a data entry request from OCFO regarding the FY 2018 Interim FTE. **Offices have been asked to enter their adjustments to meet the FY 2018 FTE target level in the Budget Automated System by January 19th.** Before doing so, we plan to discuss and confirm the proposed changes with you in next week's SRO/SBO meeting on Tuesday, January 9th at 1pm.

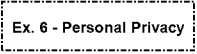
Attached for your review is OEI's 1) interim staffing plan, 2) FTE adjustments from FY 2017 enacted FTE level to meet the interim level, and 3) position/FTE tracking sheet. (We will bring copies to the SRO/SBO meeting.)

Thank you.

PLEASE NOTE: I will be out of the office January 5, 2018.

Juanita Standifer

Director
Resource and Program Management Division (RPMD)
Office of Business Operations and Services (OBOS)
Office of Environmental Information (OEI)

US Environmental Protection Agency (US EPA)
1200 Pennsylvania Avenue, NW (Mailcode: 2812T)
Washington, DC 20460
Off (202) 566-2764 ~ Cell 
Fax (202) 566-0968

From: Burse, Tiwanda
Sent: Tuesday, November 28, 2017 11:18 AM
To: Simon, Harvey <Simon.Harvey@epa.gov>; Fine, Steven <fine.steven@epa.gov>

Cc: Larsen, Elena <Larsen.Elena@epa.gov>; Jones-Parra, Lisa <Jones-Parra.Lisa@epa.gov>; Grogard, Megan <Grogard.Megan@epa.gov>; Braxton, Marilyn <Braxton.Marilyn@epa.gov>; Standifer, Juanita <Standifer.Juanita@epa.gov>

Subject: RE: OEI FTE Interim Staffing Plan

Here it is again.

Tiwanda M. Burse
Acting Director, Office of Business Operations and Services
202-566-1405 (office)
202-515-6429 (mobile)

From: Simon, Harvey

Sent: Tuesday, November 28, 2017 11:08 AM

To: Burse, Tiwanda <burse.tiwanda@epa.gov>; Fine, Steven <fine.steven@epa.gov>

Cc: Larsen, Elena <Larsen.Elena@epa.gov>; Jones-Parra, Lisa <Jones-Parra.Lisa@epa.gov>; Grogard, Megan <Grogard.Megan@epa.gov>; Braxton, Marilyn <Braxton.Marilyn@epa.gov>; Standifer, Juanita <Standifer.Juanita@epa.gov>

Subject: RE: OEI FTE Interim Staffing Plan

Can you send me the link to the document? For some reason it isn't showing up as an attachment for me.

From: Burse, Tiwanda

Sent: Tuesday, November 28, 2017 10:23 AM

To: Simon, Harvey <Simon.Harvey@epa.gov>; Fine, Steven <fine.steven@epa.gov>

Cc: Larsen, Elena <Larsen.Elena@epa.gov>; Jones-Parra, Lisa <Jones-Parra.Lisa@epa.gov>; Grogard, Megan <Grogard.Megan@epa.gov>; Braxton, Marilyn <Braxton.Marilyn@epa.gov>; Standifer, Juanita <Standifer.Juanita@epa.gov>

Subject: RE: OEI FTE Interim Staffing Plan

Steve and Harvey,

We have incorporated your feedback. Please advise on next steps. Do you need anything else from us?

Thanks,
Tiwanda

Tiwanda M. Burse
Acting Director, Office of Business Operations and Services
202-566-1405 (office)
202-515-6429 (mobile)

From: Simon, Harvey

Sent: Monday, November 27, 2017 1:24 PM

To: Fine, Steven <fine.steven@epa.gov>; Burse, Tiwanda <burse.tiwanda@epa.gov>

Cc: Larsen, Elena <Larsen.Elena@epa.gov>; Jones-Parra, Lisa <Jones-Parra.Lisa@epa.gov>; Grogard, Megan <Grogard.Megan@epa.gov>; Braxton, Marilyn <Braxton.Marilyn@epa.gov>; Standifer, Juanita <Standifer.Juanita@epa.gov>

Subject: RE: OEI FTE Interim Staffing Plan

That makes sense to me.

From: Fine, Steven
Sent: Monday, November 27, 2017 12:56 PM
To: Burse, Tiwanda <burse.tiwanda@epa.gov>; Simon, Harvey <Simon.Harvey@epa.gov>
Cc: Larsen, Elena <Larsen.Elena@epa.gov>; Jones-Parra, Lisa <Jones-Parra.Lisa@epa.gov>; Grogard, Megan <Grogard.Megan@epa.gov>; Braxton, Marilyn <Braxton.Marilyn@epa.gov>; Standifer, Juanita <Standifer.Juanita@epa.gov>
Subject: RE: OEI FTE Interim Staffing Plan
Importance: High

I wonder if

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Feedback or alternate suggestions?

Thanks.

Steve

From: Burse, Tiwanda
Sent: Monday, November 27, 2017 9:19 AM
To: Fine, Steven <fine.steven@epa.gov>; Simon, Harvey <Simon.Harvey@epa.gov>
Cc: Larsen, Elena <Larsen.Elena@epa.gov>; Jones-Parra, Lisa <Jones-Parra.Lisa@epa.gov>; Grogard, Megan <Grogard.Megan@epa.gov>; Braxton, Marilyn <Braxton.Marilyn@epa.gov>; Standifer, Juanita <Standifer.Juanita@epa.gov>
Subject: RE: OEI FTE Interim Staffing Plan

Steve and Harvey,

Thanks for your comments. We will update the draft accordingly.

In regards to Harvey's suggestion

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Thanks,
Tiwanda

Tiwanda M. Burse
Acting Director, Office of Business Operations and Services
202-566-1405 (office)
202-515-6429 (mobile)

From: Fine, Steven
Sent: Friday, November 24, 2017 9:57 AM
To: Burse, Tiwanda <burse.tiwanda@epa.gov>; Simon, Harvey <Simon.Harvey@epa.gov>
Cc: Larsen, Elena <Larsen.Elena@epa.gov>; Jones-Parra, Lisa <Jones-Parra.Lisa@epa.gov>; Grogard, Megan <Grogard.Megan@epa.gov>; Braxton, Marilyn <Braxton.Marilyn@epa.gov>; Standifer, Juanita <Standifer.Juanita@epa.gov>
Subject: RE: OEI FTE Interim Staffing Plan

Marilyn and Tiwanda, thank you. That's an excellent start.

All, please see the edits and comments I have added to the online document. Feedback or alternate suggestions?

Thanks.

Steve

From: Burse, Tiwanda

Sent: Wednesday, November 22, 2017 9:56 AM

To: Fine, Steven <fine.steven@epa.gov>; Simon, Harvey <Simon.Harvey@epa.gov>

Cc: Larsen, Elena <Larsen.Elena@epa.gov>; Jones-Parra, Lisa <Jones-Parra.Lisa@epa.gov>; Grogard, Megan <Grogard.Megan@epa.gov>; Braxton, Marilyn <Braxton.Marilyn@epa.gov>; Standifer, Juanita <Standifer.Juanita@epa.gov>

Subject: OEI FTE Interim Staffing Plan

Steve & Harvey,

Attached is the draft OEI FTE Interim Staffing Plan that Marilyn and Juanita put together. Please let us know if you have any questions.

As background:

- -
 -
 -
 -
 -
 -
 -
 -
 -
- ## Ex. 5 - Deliberative Process

Thanks,

Tiwanda

Tiwanda M. Burse

Acting Director, Office of Business Operations and Services

Office of Environmental Information

U.S. Environmental Protection Agency

202-566-1405 (office)

202-515-6429 (mobile)

Burse.tiwanda@epa.gov

Message

From: Simon, Harvey [Simon.Harvey@epa.gov]
Sent: 12/8/2017 1:09:29 PM
To: Vizian, Donna [Vizian.Donna@epa.gov]; Showman, John [Showman.John@epa.gov]
CC: Fine, Steven [fine.steven@epa.gov]; Larsen, Elena [Larsen.Elena@epa.gov]; Burse, Tiwanda [burse.tiwanda@epa.gov]; Maher, Karen [Maher.Karen@epa.gov]; Braxton, Marilyn [Braxton.Marilyn@epa.gov]; Jones-Parra, Lisa [Jones-Parra.Lisa@epa.gov]; Grogard, Megan [Grogard.Megan@epa.gov]
Subject: OEI Interim Staffing Plan
Attachments: OEI Managing FTE Levels_draft 12-07-17.docx

As discussed during this week's 1st Assistants meeting, this is to provide OEI's Interim Staffing plan (attached). Please let us know if you have any questions.

Thanks,

Harvey

Harvey Simon
Acting Principal Deputy Assistant Administrator
EPA Office of Environmental Information
202-566-0917
Ex. 6 - Personal Privacy (cell)
simon.harvey@epa.gov

Message

From: Kalikhman, Yulia [kalikhman.yulia@epa.gov]
Sent: 8/14/2018 12:43:09 PM
To: Braxton, Marilyn [Braxton.Marilyn@epa.gov]
Subject: FW: Timekeeper duties

FYI

Yulia Kalikhman
Acting Director
Human Resources and Administration Division
Office of Business Operations and Services
Office of Environmental Information, US EPA
202.566.1534

[OEI's HR Corner](#)
[How to Request an HR Action](#)

From: Kalikhman, Yulia
Sent: Tuesday, August 14, 2018 8:43 AM
To: Braziel, Elizabeth <Braziel.Elizabeth@epa.gov>
Subject: RE: Timekeeper duties

Liz,

With multiple rounds of VERA/VSIP buyouts and just regular attrition in the context of a hiring freeze, unfortunately, we are all spread thin and there isn't another staff person to pick up this duty. During our next bi-weekly, let's discuss whether there are any duties that you perform that are discretionary and can be put on hold until we find a permanent solution. I don't anticipate this additional duty to be time-consuming and I appreciate your understanding.

Thank you.

Yulia Kalikhman
Acting Director
Human Resources and Administration Division
Office of Business Operations and Services
Office of Environmental Information, US EPA
202.566.1534

[OEI's HR Corner](#)
[How to Request an HR Action](#)

From: Braziel, Elizabeth
Sent: Tuesday, August 14, 2018 8:35 AM
To: Kalikhman, Yulia <kalikhman.yulia@epa.gov>
Subject: RE: Timekeeper duties

Yulia,

As primary and back up of multiple programs, sorry I will not be able to pick up this function.

Liz Braziel
566-1151

From: Kalikhman, Yulia
Sent: Monday, August 13, 2018 4:10 PM
To: Braziel, Elizabeth <Braziel.Elizabeth@epa.gov>
Subject: RE: Timekeeper duties

Georgia is still officially the primary timekeeper for these groups, so when she returns you would only be expected to perform the duties when she is out of the office.

If Georgia was to leave OEI or the Agency, you would revisit this duty with Marilyn or whoever is your supervisor at the time. This may also be adjusted as a result of the merger with OROM.

Yulia Kalikhman
Acting Director
Human Resources and Administration Division
Office of Business Operations and Services
Office of Environmental Information, US EPA
202.566.1534

[OEI's HR Corner](#)
[How to Request an HR Action](#)

From: Braziel, Elizabeth
Sent: Monday, August 13, 2018 4:02 PM
To: Kalikhman, Yulia <kalikhman.yulia@epa.gov>
Subject: RE: Timekeeper duties

My concern is this backup role becoming permanent or will the role revert back to Georgia when she returns. If she doesn't return, will this backup role become a primary role?

Liz

From: Kalikhman, Yulia
Sent: Monday, August 13, 2018 3:52 PM
To: Braziel, Elizabeth <Braziel.Elizabeth@epa.gov>
Subject: RE: Timekeeper duties

Yes, it would be the same duties, and yes, I am talking to Vaughn's IO.

Yulia Kalikhman
Acting Director
Human Resources and Administration Division
Office of Business Operations and Services
Office of Environmental Information, US EPA
202.566.1534

[OEI's HR Corner](#)
[How to Request an HR Action](#)

From: Braziel, Elizabeth
Sent: Monday, August 13, 2018 3:50 PM
To: Kalikhman, Yulia <kalikhman.yulia@epa.gov>
Subject: RE: Timekeeper duties

Yulia,

What is the level of her involvement with front office, as far as OBOS it is a matter of assigning work schedules when approved by manager and or entering time at the extent of employee or manager cannot, also are you referring to OEI new IO office with Vaughn and them?

Liz

From: Kalikhman, Yulia
Sent: Monday, August 13, 2018 3:37 PM
To: Braziel, Elizabeth <Braziel.Elizabeth@epa.gov>
Subject: RE: Timekeeper duties

There are six individuals in the IO and five SES employees.

Yulia Kalikhman
Acting Director
Human Resources and Administration Division
Office of Business Operations and Services
Office of Environmental Information, US EPA
202.566.1534

[OEI's HR Corner](#)
[How to Request an HR Action](#)

From: Braziel, Elizabeth
Sent: Monday, August 13, 2018 3:33 PM
To: Kalikhman, Yulia <kalikhman.yulia@epa.gov>
Subject: RE: Timekeeper duties

Yulia,

How many people are we actually talking about?

Liz

From: Kalikhman, Yulia
Sent: Monday, August 13, 2018 3:28 PM
To: Braziel, Elizabeth <Braziel.Elizabeth@epa.gov>
Subject: Timekeeper duties

Hi Liz,

Since Georgia Bednar is out of the office on extended leave, the IO and SES managers don't have a timekeeper assigned to them. Would you be able to serve as Georgia's backup (and IO/SES primary while she is out)? Also, since you need a timekeeper and can't be your own, please use Kim Hickman as your timekeeper.

Thank you.

Yulia Kalikhman
Acting Director
Human Resources and Administration Division
Office of Business Operations and Services
Office of Environmental Information, US EPA
202.566.1534

OEI's HR Corner
How to Request an HR Action

From: Epley, Brian [epley.brian@epa.gov]
Sent: 10/6/2017 4:56:40 PM
To: Braxton, Marilyn [Braxton.Marilyn@epa.gov]
Subject: RE: Post VERA/VSIP Hiring Requests (Due 10/5/17)

Marilyn,

I called to discuss because I don't know what—if anything you may require from OITO for the 4 vacancies created as a result of VERA/VSIP.

Ex. 5 - Deliberative Process

Can you call me to clarify so we can close this action?

Thanks,
Brian

From: Braxton, Marilyn
Sent: Tuesday, September 26, 2017 8:38 AM
To: OEI-SLT <OEISLT@epa.gov>
Subject: Post VERA/VSIP Hiring Requests (Due 10/5/17)

Dear SLT,

As a follow up to Donna Vizian's September 13th on Post VERA/VSIP Hiring message to Program Office and Regional senior leaders (forwarded below), I wanted to provide you with OEI next steps for filling our positions. **Please complete the attached Excel file to provide a ranked list of permanent hire and detail request by COB Thursday, October 5th (cc Tiwanda and Renee).** In this list, please provide a 1-2 sentence justification for the critical nature of these requests.

Review the message below for more detail about how the HR Shared Service Centers will be reviewing our hiring and detail actions post-VERA/VSIP:

Per Donna Vizian's email, Senior Resource Officials (SROs) are responsible for closely monitoring all personnel actions to ensure compliance with approved VERA/VSIP packages prior to submission to the HR Shared Service Center (SCC). In addition, OARM has instructed the SSCs to review all incoming actions for adherence to the commitment/business case of the packages.

The particular actions that will be most important to monitor during this process are Recruitments, Reassignments, Details and Temporary Promotions. Effective immediately, all of these types of actions submitted to the SSCs must contain the following comment in the FPPS Notes section: "This action has been approved by the SRO and is not in conflict with VERA/VSIP commitments."

OEI outlined the intent to reduce certain types of positions (specifically, high graded non-supervisory). I have attached the Agency's full VERA/VSIP plan; OEI's portion is located on pages 19 through 21. RTP-SSC will review actions that come in and if it conflicts appear with our VERA/VSIP plan, they will ask me to address and explain. This is to ensure that EPA is in full compliance with its approved VERA/VSIP plans.

Any position vacated by VERA/VSIP must be eliminated or restructured prior to filling. The SSC will be evaluating new positions against vacated VERA/VSIP positions to determine if they have been restructured meeting the following criteria:

- Different series
- Same series, lower grade and FPL
- Same series, same grade (or FPL) but position has been restructured (i.e., significant change in duties). Significant change in duties to be described as a combination of new duties (25% or more) and new qualifications/specialized experience.

The SSCs will also be updating the Hiring Guidance SharePoint Site with this information and any further clarifying information in the future (<https://> **Ex. 6 - Personal Privacy**)

Ex. 6 - Personal Privacy

Please let me know if you have any questions, or if you need further clarification.

Regards!

Marilyn A. Braxton

202-564-8192

Ex. 6 - Personal Privacy (mobile)

Website: [OEI's HR Corner](#)

From: Vizian, Donna

Sent: Wednesday, September 13, 2017 1:08 PM

To: 2017HQfirstassistants <2017HQfirstassistants@epa.gov>; 2017Regionfirstassistants <2017Regionfirstassistants@epa.gov>

Cc: DAA-Career <DAACareer@epa.gov>; DRA <DRA@epa.gov>; ARA <ARA@epa.gov>; Helm, Arron <Helm.Arron@epa.gov>; Carter, Rick <Carter.Rick@epa.gov>; Gray, Linda <gray.linda@epa.gov>; Carpenter, Wesley <Carpenter.Wesley@epa.gov>; Hart, Debbi <Hart.Debbi@epa.gov>

Subject: Post VERA/VSIP Hiring

Hi Everyone,

With the completion of our VERA/VSIP program, we now need to ensure the Agency adheres to the commitments that were set in the VERA/VSIP package. The agency must ensure that we not only adhere to the individual position requirement of not backfilling vacated VERA/VSIP positions but that we also meet the full intent of the packages that were approved by OPM. This means that if a package stated an intent to reduce numbers of certain types of positions (supervisory, high graded non-supervisory, specific job series at certain grades, etc.) that we adhere to these commitments. Also, if a package stated an intent to restructure a position, we must ensure that we sufficiently restructure the position with clearly different duties, different occupational series or lower grade level.

The SROs should be closely monitoring personnel actions for their organizations to ensure that they are fully consistent with the approved VERA/VSIP packages prior to submission of any personnel action to the HR Shared Service Centers (SSCs). In addition, we will require each AA-ship and Region to provide a quarterly Post-VERA/VSIP HR Actions report to OHR. We will provide a format and guidance shortly.

As an additional level of control, I have instructed the SSCs to review all incoming personnel actions for adherence to the commitments of our VERA/VSIP packages made by each organization. The SSC will review not only recruit actions but all classification, reassignment, temporary promotion and detail actions. Offices may be asked by the SSCs to provide a clarification or explanation of how your submitted personnel actions meet the language and intent of your VERA/VSIP packages. The SSCs have been asked to question and elevate anything that could impact the agency keeping the VERA/VSIP commitments. Please work with your servicing SSC to ensure that the agency is able to meet these requirements and efficiently move personnel actions. I encourage you to engage with your SSC to communicate your

overall plans regarding restructuring and address any questions related to these requirements. This proactive approach will help the SSC evaluate your actions and move quickly to resolve any issues.

Please have your staff contact your servicing SSC Director if there are additional questions. I really appreciate your attention to this.

Best,
Donna

Message

From: Hitchens, Lynnann [hitchens.lynnann@epa.gov]
Sent: 1/31/2018 4:17:08 PM
To: Fine, Steven [fine.steven@epa.gov]; Simon, Harvey [Simon.Harvey@epa.gov]; Vizian, Donna [Vizian.Donna@epa.gov]; Showman, John [Showman.John@epa.gov]
CC: Braxton, Marilyn [Braxton.Marilyn@epa.gov]; Grimm, Patrick [Grimm.Patrick@epa.gov]; Grogard, Megan [Grogard.Megan@epa.gov]; Jones-Parra, Lisa [Jones-Parra.Lisa@epa.gov]; Cooper, Marian [Cooper.Marian@epa.gov]
Subject: Talking points and Q and A
Attachments: OMS Talking Points for All Hands 1 31 18.docx; QAs - Office of Mission Support 1 31 18.docx; OMS-Business Ofc Talking Points 1 31 18.docx; Desk Statement OARM OEI Reorganization 1 31 18.docx

Folks –

This morning cleaned up the two files sent yesterday – OMS Talking Points for All Hands and QAs – Office of Mission Support. Here is the final version of both files along with a Desk Statement.

I also modified the Business Office talking points to mirror the edits made to the OMS talking points.

Lynnann Hitchens
Acting Director, Office of Resources, Operations and Management
Office of Administration and Resources Management
P: 202-564-3184
M: Ex. 6 - Personal Privacy

From: Hitchens, Lynnann
Sent: Tuesday, January 30, 2018 3:13 PM
To: Fine, Steven <fine.steven@epa.gov>; Simon, Harvey <Simon.Harvey@epa.gov>; Vizian, Donna <Vizian.Donna@epa.gov>; Showman, John <Showman.John@epa.gov>
Cc: Braxton, Marilyn <Braxton.Marilyn@epa.gov>; Grogard, Megan <Grogard.Megan@epa.gov>
Subject: talking points and Q and A

Reviewed this with Steve/Donna/John and Harvey.

Lynnann Hitchens
Acting Director, Office of Resources, Operations and Management
Office of Administration and Resources Management
P: 202-564-3184
M: Ex. 6 - Personal Privacy

EPA To Reorganize Mission Support Functions

Contact Information:

The Environmental Protection Agency has announced plans to merge the Office of Administration and Resources Management and the Office of Environmental Information, creating a consolidated mission support office. The new organization will house IT, information management, and the management of facilities, human resources, contracts, and grants. Though the details of new organizational structure are still under development, the change was announced to affected employees. No jobs will be eliminated due to this restructuring. Agency leadership is committed to making this transition as seamless as possible and take advantage of the merger to improve the way mission support functions are delivered for the agency.

III. MITIGATING FACTORS

EPA is committed to providing as many opportunities as possible to employees impacted by the transition to service centers. Mitigation simply refers to lessening or softening the impact of consolidation on employees affected by the changes. The mitigation factors listed in this

section characterize the options available to facilitate the transition. Whatever tools the Agency decides to utilize, it is important to provide a variety of options to employees as early as possible.

An important aspect of determining which options are available is whether the consolidation of HR functions into service centers is a "reorganization" or a "transfer of function." After careful consideration and research, the HROs have determined that the consolidation constitutes a reorganization. For further information regarding this decision, including the advantages and disadvantages, please see *Transfer of Function versus Reorganization* (Attachment 11).

A. Discontinued Service

An employee at age 50 or more with at least 20 years of service, or an employee at any age with at least 25 years of service, may qualify for discontinued service retirement. This applies in cases of involuntary separation from the Federal service which do not result from misconduct or delinquency. For CSRS employees, the annuity is reduced by 1/6 percent for each full month (two percent a year) under age 55. There is no reduction for age for FERS employees.

B. Priority Placement

Though EPA has not used the Priority Placement Program (PPP), normally associated with a Reduction in Force (RIF), other governmental agencies have used this program. The PPP is an administrative program, governed by policy and procedures, that match employee and organizational needs in a systematic and equitable manner. Placements are made by reassignment or re-promotion of PPP registrants into properly classified positions. The goal is to minimize the adverse effects on employees caused by actions such as, but not limited to, reductions-in-force, base closures, realignments, consolidations, contracting out, position classification decisions, rotation from overseas, and transfers of function (TOF). Although it is the primary vehicle for placing employees adversely affected through no fault of their own, it does not supersede the statutory or regulatory rights of employees or former employees.

Though the PPP is traditionally targeted for employees separated from an agency, EPA could develop an internal process to place employees not leaving the agency, but the nature of their work has changed or no longer exists. Theoretically, prior to recruiting externally, EPA would consider displaced employees for any openings. This program would require a priority listing methodology that could be administered centrally. Potential challenges to management support for an internal PPP are unplanned FTE loss due to employee uncertainty and potentially low morale. On the positive side are low costs, placement opportunities for displaced or remaining employees, and alignment with the goals of building a stronger EPA.

C. Deferred Retirement

This option is available for employees who leave federal employment before qualifying for an immediate annuity. A minimum of five years of creditable Federal civilian service is required to have eligibility for a deferred retirement annuity. Employees may receive benefits at age 62 with a least five years of service, and at minimum retirement age with 10 years of service.

D. Career Transition Assistance

We may provide career transition assistance to potentially impacted employees, including, but not limited to, such services as:

- Formal and informal skills assessments, career counseling, resume writing, "Career Power" workshops, and similar support to assist employees who may wish to transition to other jobs, careers, or lines of work within or outside EPA;
- Employee Assistance Program (EAP) counseling and/or workshops on coping with change;
- Networking/partnering with other agencies, especially through Federal Executive Boards where available, to possibly include paid details of employees to other agencies who may hire them eventually;
- Retirement and benefits counseling to assist those who may consider retiring either under voluntary retirement or under Early-Out/Buy-Out if offered;
- Financial planning seminars to assist employees in making retirement, job change, or other transition decisions;
- Professional outplacement services; and
- Retraining that may include formal education, cross-training, or on-the-job training in another EPA job function that supports the mission.

E. Relocation Assistance

We may provide relocation assistance to potentially affected employees relocating to service centers. EPA policy describes when relocation expenses are an entitlement. Generally, when management directs an employee to relocate to a new commuting area, EPA must pay relocation expenses; including reimbursement for travel and transportation expenses, movement of household goods, temporary storage of household goods, and real estate expenses. In addition, employees must receive all expenses associated with the move. This means that we may not negotiate what expenses we will pay to employees. It is not yet known how many employees may relocate. Relocation for a GS-13 with a spouse and two dependent children and home sale is estimated at about \$75,000. Relocation without a home sale is estimated at \$25,000.

F. Early-Out/Buy-Out

Voluntary Separation Incentive Payment (VSIP) and Voluntary Early Retirement Authority (VERA) are considered the Agency's primary tools for mitigating the potential impacts caused by consolidation of HR functions into two service centers. We are currently developing an Early-Out/Buy-Out package (EO/BO) for EPA employees

performing HR work and we expect to complete the package by January 2018. Since the approval process may take six months to a year, we may need to expedite the process depending on the implementation schedule. Attachment 12 identifies the potential number of employees eligible under VSIP and VERA and the possible excluded positions. EPA can use these tools to re-skill remaining staff, reshape the residual organization, lessen the impact on morale, provide employees with choices, mitigate the impact of reductions, provide placement options for remaining staff, and minimize disruption to the organization. However, an EO/BO offer may result in the loss of needed skills and knowledge as well as workload balance issues. For more information regarding EO/BO eligibility please refer to *Transfer of Function versus Reorganization* (Attachment 11). Key elements of EO/BO include the following:

- ***Voluntary Separation Incentive Payment (VSIP)*** (aka Buy-Out) is an option for increasing voluntary attrition in agencies that are downsizing or restructuring. VSIP allows agencies to offer lump-sum payments as an incentive to employees who are in surplus positions as a result of reorganization or redirected positions, or have skills that are no longer needed. Under VSIP an agency may pay up to \$25,000 or an amount equal to the amount of severance pay an employee is entitled to receive, whichever is less. Employees may separate to accept VSIP by resignation or optional retirement or VERA, if approved.
- ***Voluntary Early Retirement Authority (VERA)*** (aka Early-Out) provides agencies the option to offer voluntary early retirement when restructuring or downsizing. Employees must have completed at least 20 years of creditable service and be at least 50, or has completed at least 25 years of creditable service regardless of age.

G. Reduction in Force

The Senior Leadership Team is not recommending the use of a Reduction in Force (RIF). A RIF would disrupt the agency as a whole and have an extremely adverse impact on employee morale, especially in light of future consolidation efforts in other areas. An agency is required to use RIF procedures when an employee is faced with separation or downgrading for a reason such as reorganization, lack of work, shortage of funds, insufficient personnel ceiling, or the exercise of certain reemployment or restoration rights. To mitigate a RIF, an agency may reassign an employee without regard to RIF procedures to a vacant position at the same grade or pay, regardless of where the position is located. One may view a RIF as a mitigation strategy because it provides position closure, reduces the number of FTEs, and is a long-term savings.

OARM

Human Resource Shared Service Center Space Consolidation

Top Tier Questions and Answers

1. **Why are we moving to Shared Service Centers?** The Agency determined that consolidation of human resources (HR) transactional functions from 3 to 2 Shared Service Centers (SSCs) will improve the utilization of the EPA's real property portfolio and offer long term cost savings. Consolidation will reduce duplication of effort in operating multiple facilities. In addition, consolidation will create opportunities to reinvest resources in other critical Agency priorities
2. **How much money and how many FTEs will consolidation of the Shared Service Centers Save?**
3. **What type of analysis was done to determine where Service Centers would be located?**
4. **Will there be a Reduction in Force?** There will be no Reduction in Force in relation to this Human Resource Center Shared Service Center.
5. **How will Las Vegas Staff be reassigned?**
6. **While no current HR employees will lose a job, what steps will be taken to minimize negative impacts to employees?** EPA is preparing a number of options to be made available to employees impacted by the consolidation of the HR SSCs. These options include working to obtain Early Out/Buyout authority; SSC job opportunities and relocation support.
7. **Will all impacted employees be offered and Early Out or Buyout (EO/BO)?** If approved by the Office of Personnel Management, EPA Plans to offer Early Outs and Buyouts to employees working at the Las Vegas location.
8. **Will impacted employees have the opportunity to work someplace else in EPA?** Impacted employees are encouraged to apply for any position in the Agency for which they may be qualified and interested.
9. **How will Program and Regional Offices be organizationally and geographically assigned to servicing SSCs?** Program and Regional Servicing assignments will be determined after employees determine where they plan to reside.
10. **Were EPA Unions notified prior to a decision being made?**
11. **When does the Las Vegas Lease expire?**

Message

From: Fine, Steven [fine.steven@epa.gov]
Sent: 6/6/2017 4:48:18 PM
To: Braxton, Marilyn [Braxton.Marilyn@epa.gov]; Simon, Harvey [Simon.Harvey@epa.gov]; Maher, Karen [Maher.Karen@epa.gov]; Gutshall, Renee [Gutshall.Renee@epa.gov]
Subject: RE: Freeze of Targeted V/V Positions

I had an opportunity to ask. The initial response was that the freeze lasts until we provide offer letters.

From: Braxton, Marilyn
Sent: Tuesday, June 6, 2017 12:30 PM
To: Fine, Steven <fine.steven@epa.gov>; Simon, Harvey <Simon.Harvey@epa.gov>; Maher, Karen <Maher.Karen@epa.gov>; Gutshall, Renee <Gutshall.Renee@epa.gov>
Subject: RE: Freeze of Targeted V/V Positions

OCAPPM has two pending reassignments of new employees and one current employee being reassigned to a new PD, which is impacted by this. Do we have any idea at what point we can move forward with these types of actions?

Regards!
Marilyn A. Braxton
202-564-8192
Ex. 6 - Personal Privacy (mobile)

Website: [OEI's HR Corner](#)

From: Fine, Steven
Sent: Tuesday, June 6, 2017 12:17 PM
To: Simon, Harvey <Simon.Harvey@epa.gov>; Maher, Karen <Maher.Karen@epa.gov>; Gutshall, Renee <Gutshall.Renee@epa.gov>; Braxton, Marilyn <Braxton.Marilyn@epa.gov>
Subject: FW: Freeze of Targeted V/V Positions

All,

Please see the email I'm forwarding. Will this cause significant problems for us?

Thanks.

Steve

From: Vizian, Donna
Sent: Tuesday, June 6, 2017 10:39 AM
To: 2017HQfirstassistants <2017HQfirstassistants@epa.gov>; 2017Regionfirstassistants <2017Regionfirstassistants@epa.gov>; ARA <ARA@epa.gov>; DAA-Career <DAACareer@epa.gov>; DRA <DRA@epa.gov>
Cc: Hart, Debbi <Hart.Debbi@epa.gov>; Carpenter, Wesley <Carpenter.Wesley@epa.gov>; Gray, Linda <gray.linda@epa.gov>; Hunt, Loretta <Hunt.Loretta@epa.gov>
Subject: Freeze of Targeted V/V Positions

OPM's VERA guidance requires that VERA eligible employees serve in a position for a minimum time specified by OPM (usually 30 days prior to the date of the agency request). Given the current schedule for submitting our V/V business case later this month, please be aware that movement in and out of all targeted positions through reassignments,

reorganizations , etc. must cease effective immediately. The prohibition on movement in and out of targeted positions extends to VSIP targeted positions too.

Message

From: Fine, Steven [fine.steven@epa.gov]
Sent: 3/22/2017 12:53:47 PM
To: Braxton, Marilyn [Braxton.Marilyn@epa.gov]; Simon, Harvey [Simon.Harvey@epa.gov]
CC: Maher, Karen [Maher.Karen@epa.gov]; Gutshall, Renee [Gutshall.Renee@epa.gov]; Standifer, Juanita [Standifer.Juanita@epa.gov]
Subject: RE: information about VERA/VSIP

Marilyn,

Thank you. Excellent job. That is very helpful.

Steve

From: Braxton, Marilyn
Sent: Tuesday, March 21, 2017 5:31 PM
To: Fine, Steven <fine.steven@epa.gov>; Simon, Harvey <Simon.Harvey@epa.gov>
Cc: Maher, Karen <Maher.Karen@epa.gov>; Gutshall, Renee <Gutshall.Renee@epa.gov>; Standifer, Juanita <Standifer.Juanita@epa.gov>
Subject: FW: information about VERA/VSIP
Importance: High

Steve and Harvey,

On behalf of Karen and Renee, I'm sending you our responses to your questions related to VERA/VSIP. The responses are below. For more details, please see the attached Excel file.

Summary of OEI's approach

Ex. 5 - Deliberative Process

Summary of how many people took advantage of it (# of people and % of eligible people)

Ex. 5 - Deliberative Process

Lessons Learned

Ex. 5 - Deliberative Process

Regards!
Marilyn A. Braxton
202-564-8192
202-236-3228 (mobile)

From: Gutshall, Renee
Sent: Monday, March 20, 2017 7:29 AM
To: Braxton, Marilyn <Braxton.Marilyn@epa.gov>
Cc: Maher, Karen <Maher.Karen@epa.gov>
Subject: FW: information about VERA/VSIP
Importance: High

Hi Marilyn,

Karen and I would like you to run this process – we want to see a draft response by tomorrow afternoon.

For VERA/VSIP – Brenda and I can assist with details.

For FTE – my updated chart should answer the first 3 points. Will send that under separate cover.

Thanks,
Renee

Renee Gutshall
Deputy Director, Office of Business Operations and Services
Office of Environmental Information
U.S. Environmental Protection Agency
(202) 566-0987 desk / Ex. 6 - Personal Privacy cell
gutshall.renee@epa.gov

From: Fine, Steven
Sent: Thursday, March 16, 2017 5:08 PM
To: Braxton, Marilyn <Braxton.Marilyn@epa.gov>
Cc: Maher, Karen <Maher.Karen@epa.gov>; Gutshall, Renee <Gutshall.Renee@epa.gov>; Simon, Harvey <Simon.Harvey@epa.gov>; Standifer, Juanita <Standifer.Juanita@epa.gov>
Subject: information about VERA/VSIP

Marilyn,

Could you please send Harvey and me the following information:

- For the last VERA/VSIP
 - Summary of OEI's approach
 - Summary of how many OEI people took advantage of it (# of people and % of eligible people)
 - Lessons learned
- Report for current staff, by branch if possible
 - How many FTE are allocated to the branch
 - How many FTE are filled
 - How many FTE are primarily paid for by appropriations vs. WCF
 - How many FTE have sufficient years of service and age to be eligible for VERA/VSIP

- Names of eligible people

We have no indication that a VERA/VSIP has been or will be approved, but we'd like to understand our situation better. Would it be possible for you to provide that information by Tue. or Wed.?

Information about this request should only be shared with those people who are required to collect the information.

If you have any questions, suggestions, or concerns, please let me know.

Thanks.

Steve

Message

From: Jones-Parra, Lisa [Jones-Parra.Lisa@epa.gov]
Sent: 7/5/2017 6:32:53 PM
To: Davis, Cathy [Davis.Cathy@epa.gov]; Braxton, Marilyn [Braxton.Marilyn@epa.gov]
CC: Taylor, Jeremy [Taylor.Jeremy@epa.gov]; Atkinson, Ryan [Atkinson.Ryan@epa.gov]
Subject: RE: VERA VSIP Follow-up Information

Thank you Cathy,

Do I understand correctly that

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Thanks

Lisa

Lisa Jones-Parra
Senior Advisor to the Acting Assistant Administrator forme
and Acting Chief Information Officer
Office of Environmental Information
U.S. Environmental Protection Agency
Desk: (202) 566-1157
Cell: Ex. 6 - Personal Privacy

From: Davis, Cathy
Sent: Wednesday, July 05, 2017 2:17 PM
To: Braxton, Marilyn <Braxton.Marilyn@epa.gov>; Jones-Parra, Lisa <Jones-Parra.Lisa@epa.gov>
Cc: Taylor, Jeremy <Taylor.Jeremy@epa.gov>; Atkinson, Ryan <Atkinson.Ryan@epa.gov>
Subject: FW: VERA VSIP Follow-up Information

Good afternoon Marilyn & Lisa.

I've just returned to the office from leave and wanted to respond to your questions about the VSIP.

Employees are entitled to receive the lesser of the two (25K or Severance Pay). If an employee's severance pay is less than 25K, we will notify the employee and inform them of the amount of their buy-out, when we send out their offer to separate with a VSIP notification.

The SSC's will perform a severance pay computation for every employee who applies for the VSIP.

Please note...

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Please contact me if you have any other questions.

Thanks

Cathy Davis, Section Chief, Employee Services Branch, HRMD-RTP
U.S. EPA - Shared Service Center - RTP (MC-C-639-02)

109 T.W. Alexander Dr.
RTP, NC 27711
(919) 541-3533
(919) 541-2186 fax



From: Remmers, Janet
Sent: Monday, July 03, 2017 1:56 PM
To: Braxton, Marilyn <Braxton.Marilyn@epa.gov>
Cc: Davis, Cathy <Davis.Cathy@epa.gov>; Hunt, Loretta <Hunt.Loretta@epa.gov>; Hart, Debbi <Hart.Debbi@epa.gov>
Subject: RE: VERA VSIP Follow-up Information

I also talked to Juanita Standifer, the SBO in OEI, earlier today regarding the Budget Tables. She had some questions I answered.

Janet Remmers, Ph.D.
RPROS
Office of Budget/OCFO
Mail code: 2732A
office: 202-564-0548
aws: 301-593-7870

From: Hart, Debbi
Sent: Monday, July 03, 2017 1:51 PM
To: Braxton, Marilyn <Braxton.Marilyn@epa.gov>
Cc: Davis, Cathy <Davis.Cathy@epa.gov>; Hunt, Loretta <Hunt.Loretta@epa.gov>; Remmers, Janet <Remmers.Janet@epa.gov>
Subject: RE: VERA VSIP Follow-up Information
Importance: High

Hello Marilyn—

To answer your questions—yes. This falls under the purview of the SSCs. It is the SSCs that determine eligibility and send offers to eligible employees. I'm copying Cathy who is the RTP V/V representative in case you have other questions. But while I have you... Janet Remmers is looking for OEI's updated budget tables. Can you please let me know status? Thank you and I wish you a lovely holiday! Debbi

Debbi Hart
Director
Policy, Planning & Training Division
OHR, OARM
USEPA
202.564.2011
hart.debbi@epa.gov

From: Braxton, Marilyn
Sent: Monday, July 03, 2017 8:23 AM
To: Hunt, Loretta <Hunt.Loretta@epa.gov>; Hart, Debbi <Hart.Debbi@epa.gov>
Subject: Re: VERA VSIP Follow-up Information

Good morning,

Would you be able to clarify a few things for me? First, will people be offered different amounts of the VISIP dependent on years of service and other factors? Also, how will they be notified of the amount they will be offered? (Let me know if this is more of a SSC question.)

Sent from my iPhone

On Jun 30, 2017, at 4:10 PM, Jones-Parra, Lisa <Jones-Parra.Lisa@epa.gov> wrote:

Hi Marilyn,

You may recall that at the last Acting AA Update, during a question about the payout amount of \$25K Steve mentioned that we would pay the maximum amount of \$25K (or something to that effect). Steve found out recently that it actually depends on years of service and maybe other factors. We looked into it further (using the link below) and found the following information: "Under VSIP, agencies may pay up to \$25,000, or an amount equal to the amount of severance pay an employee would be entitled to receive, whichever less." So this is not particularly helpful because employees do not know what this means to them. So we are wondering if there is guidance out there that describe how the amount is calculated more clearly. Also, Steve would like to know if you know whether the letters that the employees will get will specify the amount that they are being offered (which may be different for each employee).

Steve is wondering if we should send a follow up note to employees assuming we can find some clarification. This is particularly important given that he may have misspoken at the meeting and the letters may be going out very soon.

Thanks

Lisa

Lisa Jones-Parra
Senior Advisor to the Acting Assistant Administrator
and Acting Chief Information Officer
Office of Environmental Information
U.S. Environmental Protection Agency
Desk: (202) 566-1157
Cell: (202) 384-2588

From: Braxton, Marilyn
Sent: Thursday, June 22, 2017 12:39 PM
To: OEI-All <OEI-ALL@epa.gov>
Subject: VERA VSIP Follow-up Information

Good afternoon,

Thank you for your questions about VERA VSIP during this morning's Updated Meeting. If you have any questions about the VERA/VSIP process or want to see the list of retirement trainings that are available, I encourage you to visit the VERA/VSIP intranet site at <http://intranet.epa.gov/policy/buyouts/index.htm> or contact the HR Shared Service Center.

This website includes information that may help answer some of the questions asked this morning, specifically:

- VERA eligible employees are those who are at least age 50 with at least 20 years creditable Federal service, OR any age with at least 25 years creditable Federal service.
- An employee who receives a VSIP (i.e. buy out) and later accepts employment for compensation with the Government of the United States within 5 years of the date of the separation on which the VSIP is based, including work under a personal services contract or other direct contract, must repay the entire amount of the VSIP to the agency that paid it—before the individual's first day of reemployment.
- The process for withdrawing applications has not yet been defined by the Agency as of yet. Most of the details concerning the VERA/VSIP process, including the deadline to withdraw an application, will be in the letters that will be sent out.

Regards!

Marilyn A. Braxton

202-564-8192

Ex. 6 - Personal Privacy (mobile)

Website: [OEI's HR Corner](#)

From: MassMailer

Sent: Tuesday, June 20, 2017 2:13 PM

To: Mass Mailer <Mass_Mailer@epa.gov>

Subject: Update on VERA/VSIP Opportunities

<image001.jpg>

Dear Colleagues,

On June 1, 2017, I announced that the agency had begun a workforce reshaping effort in which headquarters and regional offices were reviewing their current organizations and analyzing where they can achieve efficiencies. On June 16, 2017, the agency submitted its draft request to the Office of Personnel Management and the Office of Management and Budget to use VERA (also known as early-out) and VSIP (also known as buy-out) where it makes sense and where it is aligned with these efficiencies.

Our agency-wide business case for VERA/VISIP reflects multiple factors, including increasing the staff to supervisor ratio; consolidating and streamlining functions; restructuring or reducing highly graded supervisory and non-supervisory positions; and focusing on core business functions, programmatic and STEM (science, technology, engineering and mathematics) priorities.

We expect to hear from OPM and OMB on our request by late June. In the interim, agency management will share with employees information on the grades, occupational series, and geographic locations within their organization that are included in the VERA and VSIP request. We expect a limited number of employees will be offered VERA/VSIP, and those who accept a VERA/VSIP offer must leave the agency by early September. The decision to take advantage of a VERA or VSIP is entirely voluntary.

Throughout this process, we will be working with our union partners. We will provide more details as they become available. Thank you again for your support as we work through this together.

Mike Flynn
Acting Deputy Administrator

Message

From: Young, Brenda [young.brenda@epa.gov]
Sent: 3/21/2017 7:27:37 PM
To: Braxton, Marilyn [Braxton.Marilyn@epa.gov]; Gutshall, Renee [Gutshall.Renee@epa.gov]
Subject: RE: Input Requested: VERA VSIP Information (draft)
Attachments: Explanation for SLT_v5.docx; Combined OEI & Agency Talking Points - 2 11 14.docx; OEI All Speaker Notes -- V&V 12-16-13.docx; Potential VV Impacts -- OPM 02072014.docx

Without knowing specifically what was asked, I've added notes below and attached a couple summary one-pagers that were given to various audiences. These summaries contain details on the process along with information on our strategy.

Explanation for SLT – briefing given to SLT on 12/5 for proposed V&V Offer
Briefing given to OEI employees on 12/17 – includes timeline of activities
Talking points for OEI All hands on 2-11.
Potential V&V Impacts – Document each Office developed to describe potential impacts of the V/V offers.

Brenda Young
Deputy Director
Office of Digital Services and Technical Architecture
EPA Office of Environmental Information
(work) 202-564-3989
(cell) Ex. 6 - Personal Privacy

From: Braxton, Marilyn
Sent: Tuesday, March 21, 2017 12:19 PM
To: Gutshall, Renee <Gutshall.Renee@epa.gov>; Young, Brenda <young.brenda@epa.gov>
Subject: Input Requested: VERA VSIP Information (draft)

Brenda and Renee,
Do you have any thoughts on the information outlined below, as it pertains to that last VERA/VSIP process. I'm specifically interested in knowing if you have any lessons learned about the process. And if you have any correction or revisions to the approach

Summary of OEI's approach

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Summary of how many people took advantage of it (# of people and % of eligible people)

Ex. 5 - Deliberative Process

Lessons Learned

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Message

From: Gutshall, Renee [Gutshall.Renee@epa.gov]
Sent: 5/4/2017 4:33:15 PM
To: Maher, Karen [Maher.Karen@epa.gov]; Braxton, Marilyn [Braxton.Marilyn@epa.gov]
Subject: FW: OECA VERA/VSIP narrative (OARM 5/5 deliverable)
Attachments: OECA VERA VSIP2.docx

FYI

From: McDonald, James
Sent: Friday, April 28, 2017 10:00 AM
To: Gutshall, Renee <Gutshall.Renee@epa.gov>; Simon, Harvey <Simon.Harvey@epa.gov>
Subject: FW: OECA VERA/VSIP narrative (OARM 5/5 deliverable)

Hi Harvey/Renee,

Attached is the OECA V/V language that I wanted to share which may help as you continue to develop the OEI language.

Regards,

Mike

From: Badalamente, Mark
Sent: Friday, April 28, 2017 7:17 AM
To: OECA Office Directors and Deputy Directors; Starfield, Lawrence; Cozad, David; Miles, Erin; Chu, Ed; Brincks, Mike; Gargas, Toni; LaBoda, Sarah
Cc: Milton, Laura
Subject: OECA VERA/VSIP narrative (OARM 5/5 deliverable)

Thanks for the input and discussion on the initial draft of OECA's "themes" VERA/VSIP document. This version reflects that input, and I am now sharing it for a final review before we submit it to OARM next Friday. Please do not share this broadly or distribute to staff. Please send comments and questions to me or Laura Milton.

Mark Badalamente
Acting Deputy Assistant Administrator for Management
Senior Resource Official (SRO)
Senior Information Official (SIO)
Office of Enforcement and Compliance Assurance

US Environmental Protection Agency
William Jefferson Clinton Building
Room 3235 South
Office: 202-564-4673
Mobile:

Ex. 6 - Personal Privacy

Message

From: Gutshall, Renee [Gutshall.Renee@epa.gov]
Sent: 5/4/2017 4:32:01 PM
To: Braxton, Marilyn [Braxton.Marilyn@epa.gov]; Maher, Karen [Maher.Karen@epa.gov]
Subject: FW: VERA/VSIP: OARM & OCFO initial proposals
Attachments: OCFO FY17 VERA-VSIP 1-Page Proposal as of 05-03-2017.docx; ATT00001.htm; VERA VSIP OARM & OCFO initial proposals 20170427.docx; ATT00002.htm; Working Capital Fund Service Level Planning.docx; ATT00003.htm

FYI

From: McDonald, James
Sent: Wednesday, May 03, 2017 11:23 PM
To: Simon, Harvey <Simon.Harvey@epa.gov>; Gutshall, Renee <Gutshall.Renee@epa.gov>
Subject: Fwd: VERA/VSIP: OARM & OCFO initial proposals

FYSA

Sent from my iPhone

Begin forwarded message:

From: "Westenberger, Andrea" <Westenberger.Andrea@epa.gov>
Date: May 3, 2017 at 5:59:09 PM CDT
To: ARA <ARA@epa.gov>, Deputy ARAs <Deputy_ARAs@epa.gov>
Subject: FW: VERA/VSIP: OARM & OCFO initial proposals

Hi all – Attached is the current draft of OCFO's V/V proposal. We still haven't received OARM's so I've included the notes from the last conversation we had with OARM (last week). If you have comments, please share them with me via email (by COB Thursday) or on the ARA call on Thursday, 5/4 at 12pm PT.

Additionally, as a heads up, OCFO is working on how to plan for different budget cut scenarios for the Working Capital Fund. See the attachment for more details. As they develop their plan/report, a working group (of ARAs & IRMBCs) will review in preparation for our planned ARA meetings in Seattle the week of June 12. See the attachment for more details.

Thanks,
Andrea

Andrea Westenberger
Lead Region Coordinator for OCFO & OARM
Regional Planner | Strategic Planning | EPA Region 10
1200 Sixth Avenue, OMP 21-I01
Seattle, WA 98101
(206) 553-6111 (office)

Ex. 6 - Personal Privacy

 (cell)
westenberger.andrea@epa.gov

From: Westenberger, Andrea
Sent: Thursday, April 27, 2017 8:40 AM
To: ARA <ARA@epa.gov>; Deputy ARAs <Deputy_ARAs@epa.gov>
Subject: VERA/VSIP: OARM & OCFO initial proposals

Hello ARAs & Deputy ARAs,

Attached is a summary of the initial proposals from OARM & OCFO. We have not yet received these proposals in writing so this is all draft; please don't share widely.

ARAs – we will discuss today at the 12pm PT meeting. Talk to you then.

Thanks,
Andrea

Andrea Westenberger

Lead Region Coordinator for OCFO & OARM

Regional Planner | Strategic Planning | EPA Region 10

1200 Sixth Avenue, OMP 21-I01

Seattle, WA 98101

(206) 553-6111 (office)

Ex. 6 - Personal Privacy (cell)

westenberger.andrea@epa.gov

Message

From: Gutshall, Renee [Gutshall.Renee@epa.gov]
Sent: 5/24/2017 7:45:47 PM
To: Grogard, Megan [Grogard.Megan@epa.gov]
CC: Simon, Harvey [Simon.Harvey@epa.gov]; Fine, Steven [fine.steven@epa.gov]; Maher, Karen [Maher.Karen@epa.gov]; Braxton, Marilyn [Braxton.Marilyn@epa.gov]; Standifer, Juanita [Standifer.Juanita@epa.gov]
Subject: FW: Final VERA VSIP package
Attachments: OEI VERA-VSIP Business Case_5.24.2017 Final Draft.docx; OEI Targeted Positions Template - 5.24.20171.xlsx; OEI V-V Org Chart 05-15-2017.pptx

Importance: High

Hi Megan,

Here are the 3 attachments that Harvey and Steve need to review one last time. The numbers have been vetted by Juanita.

Thanks,
Renee

Renee Gutshall
Deputy Director, Office of Business Operations and Services
Office of Environmental Information
U.S. Environmental Protection Agency
(202) 566-0987 desk / (Ex. 6 - Personal Privacy) cell
gutshall.renee@epa.gov

From: Braxton, Marilyn
Sent: Wednesday, May 24, 2017 3:35 PM
To: Maher, Karen <Maher.Karen@epa.gov>; Gutshall, Renee <Gutshall.Renee@epa.gov>
Subject: Final VERA VSIP package
Importance: High

Attached is the final package. And below is the email Renee sent earlier to Megan.

From: Steven Fine
To: Debbi Hart
Cc: Maher, Karen <maher.karen@epa.gov>; Braxton, Marilyn <Braxton.Marilyn@epa.gov>; Gutshall, Renee <gutshall.renee@epa.gov>; Simon, Harvey <Simon.Harvey@epa.gov>; Standifer, Juanita <Standifer.Juanita@epa.gov>

Debbi,

As requested, please find attached OEI's VERA/VSIP Business Case and associated files. Please let us know if you have any questions or comments as you prepare the Agency's formal proposal.

Thank you,
Steve

Message

From: Maher, Karen [Maher.Karen@epa.gov]
Sent: 5/24/2017 12:06:54 PM
To: Fine, Steven [fine.steven@epa.gov]; Simon, Harvey [Simon.Harvey@epa.gov]
CC: Gutshall, Renee [Gutshall.Renee@epa.gov]; Braxton, Marilyn [Braxton.Marilyn@epa.gov]; Larsen, Elena [Larsen.Elena@epa.gov]
Subject: Updated VERA/VISP Files
Attachments: OEI VERA-VSIP Business Case_5.19.2017 Final Draft.docx; 2 Targeted Positions Template - unlocked5.xlsx

Steve and Harvey,

Good morning, attached are the updated VERA/VISP files for our meeting at 9 am.

Karen

Karen J. Maher
Director
Office of Business Operations and Services
Office of Environmental Information
U.S. Environmental Protection Agency
Phone: (202)566-0362
Cell: Ex. 6 - Personal Privacy
Maher.karen@epa.gov

Message

From: Gutshall, Renee [Gutshall.Renee@epa.gov]
Sent: 5/22/2017 5:26:53 PM
To: Fine, Steven [fine.steven@epa.gov]; Simon, Harvey [Simon.Harvey@epa.gov]
CC: Maher, Karen [Maher.Karen@epa.gov]; Braxton, Marilyn [Braxton.Marilyn@epa.gov]
Subject: FOR REVIEW: OEI Draft VERA/VSIP Business Case
Attachments: OEI VERA-VSIP Business Case_5.19.2017 Final Draft.docx; 2 Targeted Positions Template - unlocked3.xlsx; OEI V-V Org Chart 05-15-2017.pptx

Importance: High

Steve and Harvey:

Apologies for getting this to you a bit late – we had hoped to have it to you over the weekend. Please take a look at our proposal for the Draft VERA/VSIP Business Case and let us know if you have comments or questions. The Business Case is to be around 2-pages long (not exact, but stay close). It's due to the Agency by COB Wednesday, May 24th.

Feel free to direct any comments or questions to me, Karen or Marilyn.

Thanks!
Renee

Message

From: Gutshall, Renee [Gutshall.Renee@epa.gov]
Sent: 4/28/2017 11:22:26 AM
To: Fine, Steven [fine.steven@epa.gov]; Simon, Harvey [Simon.Harvey@epa.gov]
CC: Maher, Karen [Maher.Karen@epa.gov]; Braxton, Marilyn [Braxton.Marilyn@epa.gov]
Subject: Overarching Themes for VERA/VSIP
Attachments: OEI Themes VERA/VSIP.DOCX

Hi Steve and Harvey,

I am attaching a DRAFT one-pager that offers themes as to why OEI would want to pursue VERA/VSIP for your consideration. This is a draft and not fully developed as I didn't feel that we landed on a clear path through our discussions with the SLT of which level or type of positions would be best targetted. If you want to pursue VERA/VSIP for any of the OEI positions, I have provided information across several categories that we can consider.

- **Ex. 5 - Deliberative Process**
- Additional themes are included for your consideration

Finally, the ideas provided by the Region

Ex. 5 - Deliberative Process

Please let us know which theme or themes you feel are most relevant in support of OEI's goals.

Thanks,
Renee

Renee Gutshall
Deputy Director, Office of Business Operations and Services
Office of Environmental Information
U.S. Environmental Protection Agency
(202) 566-0987 desk / **Ex. 6 - Personal Privacy** cell
gutshall.renee@epa.gov

Message

From: Braxton, Marilyn [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=A58CFE1E0CE34BDD9CA1678B1A67DAB1-MBRAXTON]
Sent: 11/16/2017 7:37:43 PM
To: Burse, Tiwanda [burse.tiwanda@epa.gov]; Standifer, Juanita [Standifer.Juanita@epa.gov]
Subject: Draft FTE Interim Plan
Attachments: OEI Managing FTE Levels_draft 11-16-17.docx

Tiwanda & Juanita,
Attached is the draft interim FTE strategy, based on our conversation with Harvey this morning. Juanita, can you review the comments and make revisions where necessary? Thanks!

Marilyn A. Braxton, *HRAD Director*
Program Management Officer (PMO)

Human Resources & Administration Division | USEPA/OEI/OPM/HRAD
braxton.marilyn@epa.gov | 202-564-8192 | Ex. 6 - Personal Privacy (mobile) | EPA West 2115A | MC 2812T

Message

From: Braxton, Marilyn [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=A58CFE1E0CE34BDD9CA1678B1A67DAB1-MBRAXTON]
Sent: 11/21/2017 11:33:13 PM
To: Burse, Tiwanda [burse.tiwanda@epa.gov]; Standifer, Juanita [Standifer.Juanita@epa.gov]
Subject: Interim FTE
Attachments: OEI Managing FTE Levels_draft 11-21-17.docx

The interim FTE strategy is attached—with areas highlighted that need Juanita's input and/or correction. Happy Thanksgiving!

Regards,
Marilyn

Marilyn A. Braxton, Director
OEI Program Management Officer (PMO) and
Program Accountable Representative (PAR)

Human Resources & Administration Division | USEPA/OEI/OBOS/HRAD
braxton.marilyn@epa.gov | 202-564-8192 | Ex. 6 - Personal Privacy (mobile) | WJC West 2115A
Mailing Address: 1200 Pennsylvania Avenue, NW, Washington, DC 20460, Mail Code: 2112T
(Hours: 8:30am – 6:00pm)

OEI HR Corner: [HR Action Request and Space Request Forms](#)

Message

From: Braxton, Marilyn [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=A58CFE1E0CE34BDD9CA1678B1A67DAB1-MBRAXTON]
Sent: 5/24/2017 2:10:49 PM
To: Maher, Karen [Maher.Karen@epa.gov]; Gutshall, Renee [Gutshall.Renee@epa.gov]
Subject: Updated V/V Documents
Attachments: OEI VERA-VSIP Business Case_5.24.2017 Final Draft.docx; OEI Targeted Positions Template - 5.24.20172.xlsx; OEI V-V Org Chart 05-15-2017.pptx

Importance: High

The V/V files have been update per our conversation. I have taken out reference to safe positions. I also included a footnote on the targeted positions template that notes how we will restructure all the targeted positions.

Regards,
Marilyn

Marilyn A. Braxton, Director
OEI Program Management Officer (PMO) and
Program Accountable Representative (PAR)

Human Resources & Administration Division | USEPA/OEI/OBOS/HRAD
braxton.marilyn@epa.gov | 202-564-8192 | Ex. 6 - Personal Privacy (mobile) | WJC West 2115A
Mailing Address: 1200 Pennsylvania Avenue, NW, Washington, DC 20460, Mail Code: 2112T
(Hours: 8:30am – 6:00pm)

OEI HR Corner: [HR Action Request and Space Request Forms](#)

Message

From: Braxton, Marilyn [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=A58CFE1E0CE34BDD9CA1678B1A67DAB1-MBRAXTON]
Sent: 5/22/2017 4:53:21 PM
To: Gutshall, Renee [Gutshall.Renee@epa.gov]
CC: Maher, Karen [Maher.Karen@epa.gov]
Subject: DRAFT 2017 VERA VSIP Business Case
Attachments: OEI VERA-VSIP Business Case_5.19.2017.docx; 2 Targeted Positions Template - unlocked3.xlsx; OEI V-V Org Chart 05-15-2017.pptx

Importance: High

Hi,

I apologize for getting this to you late. Attached are the three files due to OARM this Wednesday, May 24:

- Two-page summary business case
- Targeted Positions Template
- Current and proposed post VERA/VSIP organizational charts

I'll chat with Renee about the specifics of what's included in this package during my 1 o'clock.

Regards,
Marilyn

Marilyn A. Braxton, Director
OEI Program Management Officer (PMO) and
Program Accountable Representative (PAR)

Human Resources & Administration Division | USEPA/OEI/OBOS/HRAD
braxton.marilyn@epa.gov | 202-564-8192 | Ex. 6 - Personal Privacy (mobile) | WJC West 2115A
Mailing Address: 1200 Pennsylvania Avenue, NW, Washington, DC 20460, Mail Code: 2112T
(Hours: 8:30am – 6:00pm)

OEI HR Corner: [HR Action Request and Space Request Forms](#)

Message

From: Braxton, Marilyn [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=A58CFE1E0CE34BDD9CA1678B1A67DAB1-MBRAXTON]
Sent: 4/12/2017 7:18:40 PM
To: Maher, Karen [Maher.Karen@epa.gov]
Subject: VERA VSIP Submission
Attachments: OEI V-V submission 12162013.doc

Attached is the business case. Linked below is the OneDrive folder with more related documents

Go to Reorganizations - Restricted

Regards!

Marilyn A. Braxton

202-564-8192

Ex. 6 - Personal Privacy (mobile)

Website: [OEI's HR Corner](#)

Message

From: Hart, Debbi [Hart.Debbi@epa.gov]
Sent: 1/3/2018 11:09:07 PM
To: Hanson, Paige (Catherine) [hanson.catherine@epa.gov]
CC: Hunt, Loretta [Hunt.Loretta@epa.gov]; Helm, Arron [Helm.Arron@epa.gov]; Carpenter, Wesley [Carpenter.Wesley@epa.gov]; Gray, Linda [gray.linda@epa.gov]
Subject: Follow-up to today's VERA/VSIP meeting
Attachments: VERA-VSIP Overview 5-22-17.pptx; REVISED FINAL OCFO 2017 VERA-VSIP Business Case 06-07-2017.docx

Hello Paige-

Good to meet you today! As promised, attached are a couple of items that may be helpful V/V references. The PowerPoint provides definitions/roles/descriptions/other facts pertaining to the V/V authorities (25 slides, but you can skim quickly). The second is an example office-level business case (OCFO's in fact) that was part of the agency's full business case submitted to OPM/OMB back in 2017 (only 3 pp. but it gives you the flavor of how the business cases were constructed). Contact info for me and Loretta follows, so please don't hesitate to reach out with questions. Thanks! Debbi

Debbi Hart
Director
Policy, Planning & Training Division
OHR, OARM
USEPA
202.564.2011
hart.debbi@epa.gov

Loretta L. Hunt
Branch Chief
Policy and Accountability Branch
Policy, Planning and Training Division
Office of Human Resources
U.S. EPA
Phone: (202) 564-6963
Email: hunt.loretta@epa.gov

Message

From: Schulman, Marvin [Schulman.Marvin@epa.gov]
Sent: 1/31/2018 12:19:32 AM
To: Carpenter, Wesley [Carpenter.Wesley@epa.gov]
CC: Hart, Debbi [Hart.Debbi@epa.gov]; Hunt, Loretta [Hunt.Loretta@epa.gov]
Subject: Follow Up - OHR Reorg
Attachments: Reorg Proposal (1-30-18).doc; Revised Delegations (1-8 & 1-28).docx

Importance: High

Wes –

This is a follow up to our meeting last week.

The first attachment is my draft of the reorg proposal document. The areas highlighted in yellow are where I need some text (or an explanation I can wordsmith.) The text in blue are my responses to the questions in those sections. This text needs to be reviewed

The second attachment are **revised** copies of the two delegations that need to be changed. These are **not** the current versions

Ex. 5 - Deliberative Process

I'm out of the office, but will touch base with you on Monday, when I return.

Marvin
(202) 564-7778

Message

From: Hunt, Loretta [Hunt.Loretta@epa.gov]
Sent: 3/26/2018 3:29:28 PM
To: Bonner, Jerome [Bonner.Jerome@epa.gov]
CC: Hart, Debbi [Hart.Debbi@epa.gov]; Carpenter, Wesley [Carpenter.Wesley@epa.gov]; Remmers, Janet [Remmers.Janet@epa.gov]; Carter, Rick [Carter.Rick@epa.gov]; Vaughan, Pat [Vaughan.Pat@epa.gov]; Helm, Arron [Helm.Arron@epa.gov]; Taylor, Jeremy [Taylor.Jeremy@epa.gov]; Atkinson, Ryan [Atkinson.Ryan@epa.gov]
Subject: RE: EPA VERA VSIP Request Review
Attachments: Agency's Workforce Shaping through Voluntary Early Retirement and Separation Incentive Payment Authorities (VERA/VSIP); Message from the Acting Deputy Administrator; Sample Prog and Reg Communications.docx; Message about the VERA/VSIP deadline from the Acting Deputy Administrator; Update on VERA/VSIP Opportunities

Jerome,

Previous communications are attached. OPA information is [here](#). Joanne Amorosi may also be able to assist with senior management communications. The agency V/V website and V/V application system need to be updated.

Loretta L. Hunt
Branch Chief
Policy and Accountability Branch
Policy, Planning and Training Division
Office of Human Resources
U.S. EPA
Phone: (202) 564-6963
Email: hunt.loretta@epa.gov

From: Bonner, Jerome
Sent: Monday, March 26, 2018 6:52 AM
To: Hunt, Loretta <Hunt.Loretta@epa.gov>
Cc: Hart, Debbi <Hart.Debbi@epa.gov>; Carpenter, Wesley <Carpenter.Wesley@epa.gov>; Remmers, Janet <Remmers.Janet@epa.gov>; Carter, Rick <Carter.Rick@epa.gov>; Vaughan, Pat <Vaughan.Pat@epa.gov>; Helm, Arron <Helm.Arron@epa.gov>; Taylor, Jeremy <Taylor.Jeremy@epa.gov>; Atkinson, Ryan <Atkinson.Ryan@epa.gov>
Subject: RE: EPA VERA VSIP Request Review

Hi Loretta

Who is the OPA point of contact and do you have a copies of earlier communication notices?

Thanks
JB

Jerome W. Bonner
Environmental Protection Agency
Office of Administration and Resources Management - Cincinnati
Director, Human Resources
Cincinnati Human Resources Shared Service Center
Tel: 513.569.7950
Mobile: Ex. 6 - Personal Privacy

CONFIDENTIALITY: This communication may contain privileged or other confidential information. If you are not the intended addressee, or believe you have received this communication in error, you may neither copy, disseminate, nor distribute it to anyone else or use it in any unauthorized manner; to do so is strictly prohibited and may be unlawful. If you receive this email by mistake, please advise the sender immediately by using the reply facility in your mail software and delete it from your computer. "Information in this message may be subject to the Privacy Act (5 USC 552a) and should be treated accordingly."

Message

From: Hunt, Loretta [Hunt.Loretta@epa.gov]
Sent: 4/6/2018 6:22:12 PM
To: Carpenter, Wesley [Carpenter.Wesley@epa.gov]
CC: Hart, Debbi [Hart.Debbi@epa.gov]
Subject: FW: Status of LV VERA/VSIP Request
Attachments: EPA Las Vegas Targeted Positions 3-26-18.xlsx; ORD Org Chart.docx; OARM SSC and OHR Org Chart.docx; EPA Las Vegas Shutdown VERA Request.pdf; EPA Las Vegas Shutdown VSIP Request.pdf; EPA Las Vegas Business Case 4-6-18.docx

Wes,

For your review before I submit a signature package. Thanks.

Loretta L. Hunt
Branch Chief
Policy and Accountability Branch
Policy, Planning and Training Division
Office of Human Resources
U.S. EPA
Phone: (202) 564-6963
Email: hunt.loretta@epa.gov

From: Hunt, Loretta
Sent: Thursday, April 05, 2018 9:24 AM
To: Hart, Debbi <Hart.Debbi@epa.gov>
Subject: Fwd: Status of LV VERA/VSIP Request

ORD and CI had no comments. For your review before I package and send to Wes.

Loretta L. Hunt
Branch Chief
Policy and Accountability Branch
OARM/OHR/PPTD
U.S. Environmental Protection Agency
Email: hunt.loretta@epa.gov
Phone: (202)564-6963

Begin forwarded message:

From: "Hunt, Loretta" <Hunt.Loretta@epa.gov>
Date: April 4, 2018 at 5:23:17 PM EDT
To: "Vaughan, Pat" <Vaughan.Pat@epa.gov>, "Kanet, Audrey" <kanet.audrey@epa.gov>, "Bonner, Jerome" <Bonner.Jerome@epa.gov>, Ryan Atkinson <Atkinson.Ryan@epa.gov>, "Davis, Cathy" <Davis.Cathy@epa.gov>, "Remmers, Janet" <Remmers.Janet@epa.gov>
Cc: "Hart, Debbi" <Hart.Debbi@epa.gov>, "Schulman, Marvin" <Schulman.Marvin@epa.gov>, "Hampton, Torrey" <hampton.torrey@epa.gov>, "McNeal, Detha" <McNeal.Detha@epa.gov>, "Carpenter, Wesley" <Carpenter.Wesley@epa.gov>
Subject: Status of LV VERA/VSIP Request

Everyone,

We're waiting for OCFO to let us know if the request can move forward in light of the restrictions finalized in the FY18 budget. I have been directed to send the signature package to OARM-IO so it can be signed if allowed to proceed.

This is a final call for edits or comments before I move the package forward.

Thanks.

Loretta L. Hunt
Branch Chief
Policy and Accountability Branch
Policy, Planning and Training Division
Office of Human Resources
U.S. EPA
Phone: (202) 564-6963
Email: hunt.loretta@epa.gov

Message

From: Schulman, Marvin [Schulman.Marvin@epa.gov]
Sent: 6/4/2018 6:53:27 PM
To: Carpenter, Wesley [Carpenter.Wesley@epa.gov]
Subject: E-copies of OHR reorg package
Attachments: Reorg Decision Memo (6-1-18).doc; Reorg Proposal (6-1-18 fin).doc; Staffing Plan Crosswalk (6-1-18).xlsx; OHR Org Chart Structure (6-1-18).xlsx; OHR Reorg Org Code Change Form (4-27-18).xlsx; Current OHR Functional Statement 6-1-18.doc; Proposed OHR Functional Statement (6-1-18).doc

Hi Wes –

All discussed changes have been made

Marvin
(202) 564-7778

Message

From: Vizian, Donna [Vizian.Donna@epa.gov]
Sent: 4/12/2018 6:21:27 PM
To: Carpenter, Wesley [Carpenter.Wesley@epa.gov]
CC: Showman, John [Showman.John@epa.gov]; Cooper, Marian [Cooper.Marian@epa.gov]; Hitchens, Lynnann [hitchens.lynnann@epa.gov]; Hart, Debbi [Hart.Debbi@epa.gov]
Subject: RE: REMINDER: OMB Budget Passback Request - Suspense: Apr. 16
Attachments: OMB Budget Passback Workforce Reduction ToolsApr2018 (003).docx

Good on EVS, changes to V/V attached

From: Carpenter, Wesley
Sent: Thursday, April 12, 2018 7:51 AM
To: Vizian, Donna <Vizian.Donna@epa.gov>
Cc: Showman, John <Showman.John@epa.gov>; Cooper, Marian <Cooper.Marian@epa.gov>; Hitchens, Lynnann <hitchens.lynnann@epa.gov>; Hart, Debbi <Hart.Debbi@epa.gov>
Subject: FW: REMINDER: OMB Budget Passback Request - Suspense: Apr. 16
Importance: High

Donna:

Good morning. We have developed our response to the subject OMB request, which is attached for your review. The deadline for submission to OPM electronically is Monday, April 16. Debbi and her staff did an outstanding job of developing this response. Please let me know if you have any questions, need additional information, and if you want us to submit the response on your behalf. Thanks.

Wes

From: Vizian, Donna
Sent: Wednesday, April 04, 2018 12:52 PM
To: Carpenter, Wesley <Carpenter.Wesley@epa.gov>; Showman, John <Showman.John@epa.gov>
Cc: Hitchens, Lynnann <hitchens.lynnann@epa.gov>; Bell, Matthew <Bell.Matthew@epa.gov>
Subject: FW: REMINDER: OMB Budget Passback Request - Suspense: Apr. 16
Importance: High

Wes, not sure if this was on your radar - it should be pretty straight forward

From: Santiago, Octavio J. [<mailto:Octavio.Santiago@opm.gov>]
Sent: Wednesday, April 04, 2018 12:49 PM
To: Brown, Alexis <Alexis.Brown2@opm.gov>
Subject: REMINDER: OMB Budget Passback Request - Suspense: Apr. 16
Importance: High

Good afternoon CHCOs:

This email is a reminder that information on two Budget Passback items is due **Monday, April 16** (see February 23 email from Octavio Santiago)—

In order to facilitate strategic human capital planning and to address items in the OMB Budget Passback, the Office of Personnel Management (OPM) is working with the Office of Management and Budget (OMB) to gather information on two areas:

- 1) Your planning and use of voluntary separation incentive payments (VSIP) and voluntary early retirement authority (VERA), and reduction in force (RIF). OPM needs this information to better assess the status of implementation, take-up rate, and effectiveness of these workforce reduction tools.
- 2) Your efforts to share Federal Employee Viewpoint Survey (FEVS) results at all internal levels, and assess component-level FEVS and organizational performance data to identify work units that would benefit from targeted intervention and action-planning.

As you gather the requested information for item #2, please consider the following bullets that may help you determine the kinds of information that should be shared.

Points to Consider While Preparing Your Response:

- Strategic approach to FEVS data dissemination
- Tools developed by your agency to facilitate FEVS data dissemination and analysis
- Training that your agency has shared with upper leadership, management, and/or employees to consider FEVS results and the application of information learned
- Tracking procedures that your agency has instituted to assess data dissemination, action planning, and growth over time
- Expectations shared with components around response to data reports
- Committees that have been formed to assist components in data analysis and action planning
- Mechanisms for components to report upward based on analysis and planning
- Reports provided to leadership

If you have any questions, please contact Alexis Brown (Alexis.Brown2@opm.gov) or join the FEV Budget Passback Request open call line (see below for more information). We look forward to learning from you in order to identify best practices and areas where assistance is needed.

FEVS Budget Passback Request Open Call Line

- Date: **Tomorrow, Thursday, April 5**
- Time: **11:00 a.m. – 11:30 a.m. (EDT)**
- Ex. 6 - Personal Privacy

 Participant Code:

Ex. 6 - Personal Privacy

All the best!

Octavio J. Santiago, Communications Coordinator
U.S. Office of Personnel Management, Employee Services

Message

From: Bell, Matthew [Bell.Matthew@epa.gov]
Sent: 9/29/2017 4:52:35 PM
To: Hart, Debbi [Hart.Debbi@epa.gov]; Cooper, Marian [Cooper.Marian@epa.gov]
CC: Carpenter, Wesley [Carpenter.Wesley@epa.gov]; Gray, Linda [gray.linda@epa.gov]; Hunt, Loretta [Hunt.Loretta@epa.gov]; Parker, Gary [parker.gary@epa.gov]; Helm, Arron [Helm.Arron@epa.gov]
Subject: RE: 9.14.17 Congressional on Workforce Reductions at EPA
Attachments: Congressional request 9.29.17.docx; EPA Congressional Inquiry 9-14-17 data for 4 and 5.xlsx

Hi Debbi/Arron,

Quick question. The response in #3 says the

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Are the estimates out of line or is there something else I'm missing to explain it? I know it's just an estimate but I want to make sure it lines up as best as possible.

Thanks

Sincerely,

Matthew Bell
Special Assistant
Office of Administration and Resources Management
U.S. Environmental Protection Agency
(202)564-3282

From: Hart, Debbi
Sent: Friday, September 29, 2017 11:51 AM
To: Bell, Matthew <Bell.Matthew@epa.gov>; Cooper, Marian <Cooper.Marian@epa.gov>
Cc: Carpenter, Wesley <Carpenter.Wesley@epa.gov>; Gray, Linda <gray.linda@epa.gov>; Hunt, Loretta <Hunt.Loretta@epa.gov>; Parker, Gary <parker.gary@epa.gov>
Subject: RE: 9.14.17 Congressional on Workforce Reductions at EPA
Importance: High

Please see attached and let me know if there are questions. Thanks for the additional time! ☺

Debbi Hart
Director
Policy, Planning & Training Division
OHR, OARM
USEPA
202.564.2011
hart.debbi@epa.gov

From: Cooper, Marian

Sent: Monday, September 25, 2017 5:13 PM

To: Helm, Arron <Helm.Arron@epa.gov>; Hart, Debbi <Hart.Debbi@epa.gov>; Hunt, Loretta <Hunt.Loretta@epa.gov>

Cc: Carpenter, Wesley <Carpenter.Wesley@epa.gov>; Gray, Linda <gray.linda@epa.gov>; Vizian, Donna <Vizian.Donna@epa.gov>; Showman, John <Showman.John@epa.gov>; Bell, Matthew <Bell.Matthew@epa.gov>

Subject: 9.14.17 Congressional on Workforce Reductions at EPA

Importance: High

Thanks for participating in the call with OCIR and OCFO on the agency's response to this Congressional on workforce reductions at EPA. Please provide your information to Matt and me by Thursday COB. Matt will share our responses with Donna and John before sending them off to Kyle. Kyle has agreed to prepare the draft response for Donna's signature.

The incoming is attached for your reference.

Thanks to all!

Marian

Marian Pechmann Cooper
Chief of Staff
Office of Administration and Resources Management
William Jefferson Clinton Federal Building-NORTH (3330)
Washington, DC 20460
office number -- 202 564-0620
office fax -- 202 564-0233



Message

From: Hart, Debbi [Hart.Debbi@epa.gov]
Sent: 3/7/2018 10:48:41 PM
To: Naples, Eileen [Naples.Eileen@epa.gov]
CC: Gray, Linda [gray.linda@epa.gov]; Carpenter, Wesley [Carpenter.Wesley@epa.gov]; Hunt, Loretta [Hunt.Loretta@epa.gov]; Cooper, Marian [Cooper.Marian@epa.gov]
Subject: RE: ISO OHR Materials and Input for Donna's PRA Nomination - Draft Due 3/13
Attachments: EPA VERA VSIP 2017 summary Oct2017 (002).docx; Exemplary Customer Service Award Nomination Strategic Hiring Templates 2016.docx; Bronze Medal Award EVS 2016.docx; Bronze Medal Award Telework Policy & Implementation 2016Final.docx

Hello Eileen-

Attached is another summary of last years' V/V that may have some more details for your write-up. Also attached a few award write-ups for a lot of the EVS work, telework policy and the strategic hiring templates we developed in 2016 to monitor V/V-vacated positions following our 2014 and 2015 rounds of V/V. Please take a look and let me know if you need more info.

Also thinking you may want to capture the work we've done to develop the WFP tool (TED that you saw this morning) and maybe the efforts to stand up the agency's LMS? I'm in tomorrow if you'd like to discuss. Thanks. Debbi

Debbi Hart
Director
Policy, Planning & Training Division
OHR, OARM
USEPA
202.564.2011
hart.debbi@epa.gov

From: Cooper, Marian
Sent: Wednesday, March 07, 2018 5:10 PM
To: Naples, Eileen <Naples.Eileen@epa.gov>; Hunt, Loretta <Hunt.Loretta@epa.gov>; Hart, Debbi <Hart.Debbi@epa.gov>
Cc: Gray, Linda <gray.linda@epa.gov>; Carpenter, Wesley <Carpenter.Wesley@epa.gov>
Subject: RE: ISO OHR Materials and Input for Donna's PRA Nomination - Draft Due 3/13

Thank you

Marian Pechmann Cooper
Chief of Staff
Office of Administration and Resources Management
William Jefferson Clinton Federal Building-NORTH (3330)
Washington, DC 20460
office number -- 202 564-0620
office fax -- 202 564-0233



From: Naples, Eileen
Sent: Wednesday, March 07, 2018 5:04 PM
To: Hunt, Loretta <Hunt.Loretta@epa.gov>; Hart, Debbi <Hart.Debbi@epa.gov>
Cc: Cooper, Marian <Cooper.Marian@epa.gov>; Gray, Linda <gray.linda@epa.gov>; Carpenter, Wesley <Carpenter.Wesley@epa.gov>
Subject: RE: ISO OHR Materials and Input for Donna's PRA Nomination - Draft Due 3/13

Loretta, thank you so much!

Eileen Naples
Special Assistant
Office of Administration and Resources Management
U.S. Environmental Protection Agency
(202)564-7057

From: Hunt, Loretta
Sent: Wednesday, March 07, 2018 4:31 PM
To: Naples, Eileen <Naples.Eileen@epa.gov>; Hart, Debbi <Hart.Debbi@epa.gov>
Cc: Cooper, Marian <Cooper.Marian@epa.gov>; Gray, Linda <gray.linda@epa.gov>; Carpenter, Wesley <Carpenter.Wesley@epa.gov>
Subject: RE: ISO OHR Materials and Input for Donna's PRA Nomination - Draft Due 3/13

Eileen,

VERA-VSIP

- Business case [here](#). A summary of the agency's business case can be found in the introduction section. I do not have cost savings for the ☐ employees who actually separated. An estimate was only done for the proposed maximum. You may also find something helpful in RTP's summary (attached).
- Suggested language:

Ex. 5 - Deliberative Process

Policies

- Anti-Harassment and Drug Free Workplace aren't under my purview.
- Descriptions

Telework

Ex. 5 - Deliberative Process

Transgender Order
Administrative Leave
Domestic Violence
Religious Compensatory Time Off
Position Management

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Loretta L. Hunt
Branch Chief
Policy and Accountability Branch
Policy, Planning and Training Division
Office of Human Resources
U.S. EPA
Phone: (202) 564-6963
Email: hunt.loretta@epa.gov

From: Naples, Eileen
Sent: Wednesday, March 07, 2018 9:27 AM
To: Hart, Debbi <Hart.Debbi@epa.gov>; Hunt, Loretta <Hunt.Loretta@epa.gov>
Cc: Cooper, Marian <Cooper.Marian@epa.gov>; Gray, Linda <gray.linda@epa.gov>; Carpenter, Wesley <Carpenter.Wesley@epa.gov>
Subject: ISO OHR Materials and Input for Donna's PRA Nomination - Draft Due 3/13

Hi Debbi and Loretta,

I hope that this email finds you well!

I'm in the process of drafting the justification portion of Donna's Presidential Rank Award nomination and I could use your input on a number of achievements that I would like to highlight in the write-up. While the PRA nomination covers Donna's entire career, for the purposes of OARM accomplishments, I am mostly focused on 2016 through the present.

As a preview, I would like to highlight Donna's work on earlyout/buyout, EVS innovations, and human resource policies. Please let me know if you have any questions or additional ideas about what to cover in the nomination write-up.

I need to pull together a draft PRA nomination by no later than Tuesday, March 13th, so if you could send me any applicable materials or feedback by COB today/early tomorrow, that would be incredibly helpful. My apologies for the tight turn-around.

Thanks in advance for your help!

Topics & Questions:

- Highlight Donna and OARM's work on earlyout/buyout

Ex. 5 - Deliberative Process

- Highlight innovative census approach to EVS

Ex. 5 - Deliberative Process

- Highlight Donna's work on human resource policies (e.g., the Transgender Order, Telework, Anti-harassment, Administrative Leave; Position Management; Religious Compensatory Time; Domestic Violence; Updated Drug-Free Workplace)

Ex. 5 - Deliberative Process

Best,
Eileen

Eileen Naples
Special Assistant
Office of Administration and Resources Management
U.S. Environmental Protection Agency
(202)564-7057

Message

From: Carpenter, Wesley [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=D84F6AA679F24F03990D7C6EB5CA0CAA-WCARPENT]
Sent: 10/18/2017 12:18:21 PM
To: Burbach, Joseph [burbach.joseph@epa.gov]
Subject: RE: OHR Nominations for 2017 OARM Honor Awards
Attachments: OHR Bronze Medal Nomination Form - Nicole Patterson 9-27-2017.DOCX; OHR Exemplary Customer Service Award Nomination Form 09-27-2017.docx; OHR Leadership Award for Outstanding Management Loretta Hunt 9-27-2017.docx; OHR DRB OARM Diverstiy Award Nomination Form 9-27-2017.docx; OHR ECoP One EPA Award Nomination Form 9-27-2017.docx; OHR ERD Mission Support Award Nomination 9-27-2017.docx; OHR Karen Hamlett OARM Rising Star Award Nomination Form 9-27-2017.docx; OHR OARM Rising Star Award Nomination Form - Lindsey Johnson 9-27-2017.DOCX; OHR One EPA Award Nomination Form - OGC-LER Collaboration 9-27-2017.docx; Bisa Cunningham Leadership Award for Outstanding Management Nomination Form September 2017.docx; OHR Exemplary Customer Service Award Nomination Form 09-27-2017.docx

Joe:

Here you go.

Wes

From: Burbach, Joseph
Sent: Wednesday, October 18, 2017 7:38 AM
To: Carpenter, Wesley <Carpenter.Wesley@epa.gov>
Subject: FW: OHR Nominations for 2017 OARM Honor Awards

Wes

When you get chance can you forward the docs, thanks.

Joseph Burbach
Senior Advisor
Office of Human Resources
U.S. Environmental Protection Agency
(202) 564-7783

From: Burbach, Joseph
Sent: Tuesday, October 17, 2017 9:30 AM
To: Carpenter, Wesley <Carpenter.Wesley@epa.gov>
Subject: FW: OHR Nominations for 2017 OARM Honor Awards

Wes

I am working on OHR accomplishments that can be shared with workforce and thought a few points from some of the awards write-ups could be appropriate.

I cannot copy from the pdf file, do you have word versions that you can.

Joseph Burbach

Senior Advisor
Office of Human Resources
U.S. Environmental Protection Agency
(202) 564-7783

From: Gray, Linda
Sent: Friday, September 29, 2017 9:32 AM
To: Burbach, Joseph <burbach.joseph@epa.gov>
Subject: FW: OHR Nominations for 2017 OARM Honor Awards

Linda R. Gray
Director, Office of Human Resources
Office of Administration and Resources Management
Environmental Protection Agency
(202) 564-4606 phone
(202) 564-4613 fax

From: Carpenter, Wesley
Sent: Thursday, September 28, 2017 12:04 PM
To: Lemley, Lauren <Lemley.Lauren@epa.gov>
Cc: Gray, Linda <gray.linda@epa.gov>; Hitchens, Lynnann <hitchens.lynnann@epa.gov>
Subject: OHR Nominations for 2017 OARM Honor Awards

Lauren:

Here is OHR's nominations for the 2017 OARM Honor Awards. I have two more award nominations that I will send you this afternoon.

Wes

Message

From: Carpenter, Wesley [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=D84F6AA679F24F03990D7C6EB5CA0CAA-WCARPENT]
Sent: 12/11/2017 2:54:18 PM
To: Ack, David [Ack.David@epa.gov]
CC: Hardy, Michael [Hardy.Michael@epa.gov]
Subject: HQs Tiger Team Off-boarding for Anticipated Retirements Last Week of December 2017 and First Week of January 2018

David:

Good morning. I trust you had a nice weekend. Just a quick note to seek your assistance in establishing a Tiger Team to help the wave of retirements this cycle depart from the agency. Per our discussion two weeks ago, we have more than 100 employees agencywide planning on retiring this month or next. I do not know the specific numbers by geographical locations, but I assume there will be several in the DC area. As a result, I want to set-up a Tiger Team – similar to what we did for the last VERA/VSIP – so we can streamline the separation process for retiring HQs employees. I plan on mentioning it tomorrow at the Lean Off-boarding meeting; therefore, I want to discuss with you today. Please let me know your availability. Thanks.

Wesley J. Carpenter
Deputy Director, EPA's Office of Human Resources
Tel. No.: 202-564-2019
Cell Phone: Ex. 6 - Personal Privacy
E-mail: carpenter.wesley@epa.gov

Message

From: Cherry, Katrina [Cherry.Katrina@epa.gov]
Sent: 5/23/2017 5:07:30 PM
To: Cunningham, Dennis [Cunningham.Dennis@epa.gov]
Subject: FW: VERA/VSIP
Attachments: VERA-VSIP summary proposal May 22 2017.docx

Jane said she is fine with this.

From: Cherry, Katrina
Sent: Tuesday, May 23, 2017 11:23 AM
To: Jane Nishida (Nishida.Jane@epa.gov) <Nishida.Jane@epa.gov>
Cc: Cunningham, Dennis <Cunningham.Dennis@epa.gov>
Subject: FW: VERA/VSIP

This would be the text that we would submit for our V/V request. I saw the spreadsheet Donna just sent. This text supports the "OITA 5" that we would allow. Let me know if you have edits.

From: Cunningham, Dennis
Sent: Tuesday, May 23, 2017 11:02 AM
To: Cherry, Katrina <Cherry.Katrina@epa.gov>
Subject: RE: VERA/VSIP

From: Cherry, Katrina
Sent: Tuesday, May 23, 2017 11:02 AM
To: Cunningham, Dennis <Cunningham.Dennis@epa.gov>
Subject: RE: VERA/VSIP

No attachment

From: Cunningham, Dennis
Sent: Tuesday, May 23, 2017 9:52 AM
To: Cherry, Katrina <Cherry.Katrina@epa.gov>
Subject: VERA/VSIP

Attached is the draft. It's essentially the same as what I sent yesterday, but I've added the VERA section at the bottom. Let me know of any edits you'd like to see.

Dennis

Message

From: Cunningham, Dennis [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=69036C28A2A44AF5BDD3A1D08D8EC408-DCUNNING]
Sent: 5/22/2017 5:24:02 PM
To: Cherry, Katrina [Cherry.Katrina@epa.gov]
Subject: V/V draft 1
Attachments: VERA-VSIP summary proposal May 22 2017.docx

Katrina,

I've not added some of the VERA-specific numbers in that we'll need to include, and I'll need Mike to fill in the \$ figures on the template, but the attached fills in most of what we're required to address. I've avoided addressing some of the specifics that the template requests about the jobs we'll restructure and the driving program priorities. Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

OARM might press for more details, but I hope not.

From my perspective, the biggest weakness is the discussion of Ex. 5 - Personal Privacy position.

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

I'll call around 2:00 or so to discuss.

Dennis

Appointment

From: Spraul, Greg [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=FD1EA61F0BAA453A93AEB9BCA32DA076-GSPRAUL]
Sent: 11/13/2017 6:28:24 PM
To: Spraul, Greg [/o=ExchangeLabs/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=fd1ea61f0baa453a93aeb9bca32da076-gspraul]; Stevens, Robert [Stevens.Robert@epa.gov]; Torrez, Alfredo [Torrez.Alfredo@epa.gov]; Fontaine, Tim [Fontaine.Tim@epa.gov]; Woods, Terry [Woods.Terry@epa.gov]; Erickson, Amber [/o=ExchangeLabs/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=0a17f4dd509a48089dd7455c70daae25-Erickson, Amber]; Giddings, Daniel [giddings.daniel@epa.gov]
Subject: MOS/RMS Prep Meeting for Managing FTE in FY18
Attachments: OW ATTRITION DATA BASED ON MOS ROSTER TRACKING.docx
Location: DCRoomEast3106C/DC-ICC-OW-IO
Start: 11/20/2017 4:00:00 PM
End: 11/20/2017 5:00:00 PM
Show Time As: Tentative

The purpose of this meeting is to look at the data that would inform a strategy for hitting interim FTE levels for FY18 and to prep for the meeting with Benita on 11/21.

Possible data:

- Current FTE burn rate
- Attrition rate (before VERA/VSIP)
- OW-wide details in and details out
- # of open vacancy announcements
- # of planned future vacancy announcements
- # of FTE eligible to retire



Phased Retirement Information Session

Audrey Y. Taylor - OARM/OHR/EDSD

Agenda

- What is Phased Retirement
- What is the Purpose of Phased Retirement
- Eligibility
- Benefits to Employees
- Selection Criteria
- Mentoring Criteria
- Important Decision Points
- How to Apply
- Roles and Responsibilities

What is Phased Retirement?

- Phased retirement is a voluntary process designed to help agencies with knowledge management, succession planning and employee mentoring.
- Participation is strictly voluntary and requires an agreement between the agency and the employee.
- Approval to enter into phased retirement is at management's discretion with final approval by DAA/DRA.
- Phased retirement agreements are for one year; employee enters full retirement at the end of the agreement.
- Possibility of an additional one year renewal with approval; full retirement still occurs at the end of the agreement.

What is the Purpose?

- Promote best practices and encourage experienced employees to spend time mentoring or transferring knowledge to others.
- Provide employees with the opportunity to share experiences across divisions and the agency.
- Enable an employee to transition into partial retirement.

Eligibility

- Must be a full-time employee for at least three years prior to entry into Phased Retirement.
- Must have 20 or more years of federal service.
- Must be eligible for immediate retirement under these provisions:
 - CSRS: Age 55 with 30 years of service, or age 60 with 20 years
<https://www.opm.gov/retirement-services/csrs-information/eligibility/>
 - FERS: Minimum Retirement Age with 30 years of service, or age 60 with 20 years of service
<https://www.opm.gov/retirement-services/fers-information/eligibility/>

Benefit to Employees

- Change from a full-time work schedule of 80 hours to a part-time work schedule of 40 hours per pay period.
- Collect a part-time salary along with approximately half of the monthly annuity (*Entering phased retirement may affect your final annuity. See your local benefits counselor*).
- Continue to receive credit toward full retirement.
- Receive the same benefits as a full-time employee.
- **NOTE: These rules apply to SES as well**

Benefit to Employees (cont.)

- FEHB premiums are withheld at the same rate (*continue to receive premium conversion tax benefits*).
- Continue to be covered under these benefits and deductions continue to be taken from the salary (*not the annuity check*).
 - FEGLI
 - FLTCIP
 - FSAFEDS
 - FEDVIP

Benefit to Employees (cont.)

- Continue to earn annual and sick leave.
 - One hour of annual leave for each 10 hours in a pay status (4 hours)
 - One hour of sick leave for each 20 hours in a pay status (2 hours)
- Fully retire at any time.
- May transfer to another federal agency as a full-time employee or phased retiree, but must seek approval from gaining agency.
- If employee dies while in phased retirement status, death benefits are based on CSRS and FERS provisions for deceased employees.

Selection Criteria

The selection process will be based on the following criteria:

- The agency's need for the employee to transfer his/her skill(s) or knowledge.
- The employee must possess the appropriate and specific skill(s) and the mentoring capacity to successfully ensure the transfer of knowledge.
- The employee's willingness and ability to meet the minimum mentoring requirement equivalent to 20% of the employee's biweekly work schedule (i.e., eight hours biweekly).
- The employee has submitted an adequate description of mentoring activities (EPA Order 31 Appendix A, Section C) that will facilitate transfer of critical competencies to the mentee(s).

Selection Criteria (cont.)

- Employee must sign phased retirement agreement;
- Availability of payroll and FTE to support the phased retiree;
- The employee's performance level is at least "Fully Successful," or equivalent at the time of the application for phased retirement; and
- The employee has not been subject to any misconduct-based action (e.g., adverse or disciplinary action) within the past two years from the date of the application for phased retirement.

10

Mentoring Criteria

Mentoring activities may include, but are not limited to:

- Sharing information through on the job training, developing Standard Operating Procedures, developing and providing training;
- Cataloging and storing information in databases shared with other employees, sharing strategies and processes used to conduct specific work tasks;
- Identifying and developing potential leaders; and
- One-on-one mentoring, giving advice and guidance to an individual.

Things to Consider Important Decision Points

- At the end of the phased retirement agreement, the retiree must consider the fact that returning to full-time employment is at management's discretion
- If not approved to return to a full-time status, the employee may; transfer to another agency (must first seek approval from the gaining agency), resign or retire from the current position (may fully retire at anytime)
- Conversion to part-time status is effective the following full pay period after the OARM Acting Assistant Administrator approves the agency phased retirement program application (salary immediately reduced to half)
- Deposits or redeposits must be paid within 30 days of receipt by OPM or (retiree will encounter a permanent reduction at full retirement)
- Court orders are processed and deducted from the phased retirement annuity

How to Apply?

Step 1. Seek benefits counseling from your organization's shared service center benefits coordinator who is listed at:
<http://intranet.epa.gov/ohr/benefits/benefitscoordinators.htm>.

Step 2. Complete the Environmental Protection Agency's Phased Retirement Program Application, EPA Form 3100-21 and the Phased Retirement Service Agreement.

Step 3. Complete the Office of Personnel Management's Phased Employment/Phased Retirement Status Elections, SF-3116 at https://www.opm.gov/forms/pdf_fill/sf3116.pdf. The SF-3116 is divided into three parts and will be used to elect four events. Each part explains how the form must be completed and what to do with the form after it is completed.

Step 4. Submit a mentoring plan or detailed memo outlining the plan for mentoring

Step 5. Submit your forms to your 1st level supervisor for recommendation.

Step 6. Complete application SF-2801 or SF-3107 for immediate retirement. (after approval is received)

Employees' Role

Employees are responsible for the following actions:

- Seeking detailed counseling from the SSC retirement specialist, <http://intranet.epa.gov/ohr/benefits/benefitscoordinators.htm>;
- Completing the [EPA Phased Retirement Program Application, Form 3100-21](#),
- Signing the [Phased Retirement Service Agreement](#);
- Completing the [Phased Employment/Phased Retirement Status Elections, SF-3116](#);
- Submit a mentoring plan
- Completing the appropriate application for full retirement;
- Enter mentoring hours in PeoplePlus; and
- Fully retire at the end of the phased retirement agreement.

15

First Level Supervisor's Role

- Review the application and make a recommendation.
 - Define clear expectations.
 - Collaborate on a strategic plan for mentoring.
- Forward the application to the concurring officials, if approved proceed with the following:
 - Add mentoring as a critical element to PARS,
 - Monitor the mentoring activity to ensure compliance;
 - Initiate SF-52 in FPPS for phased retirement
- Too extend phased retirement, notify the benefits officer at least 30 days prior to the expiration of the current agreement; and
- Enter into a new agreement (*new agreement should be initiated at least 30 days prior to expiration*).
- Initiate the SF-52 in FPPS for full retirement

Second Level Supervisor/Manager's Role

- Concur or not concur.
- Forward the application to the DAA/DRA.

DAA/DRA's Role

- Serve as approvers and final authority.
- Forward all applications to the benefits officer.

Benefits Officer's Role

- Assign a tracking number to the ALL applications.
- Forward the approved application to the OHR Director.
- Return all applications to the employee.
- Notify supervisor of the approved application and to initiate of SF-52 in FPPS for phased retirement.
- Notify SSC of application status (disapproved and approved) and copy SSC on notification to supervisor to initiate SF-52.
- Issue reports to management.
- Report to OPM the number of phased retirement applications received/processed.
- Collaborate with employees, supervisors and SSCs to ensure OPM is notified with 15 days prior to entering into a new agreement phasedret@opm.gov.

Office of Human Resources' Role

- Review for compliance,
- Forward application to the Office of Administration and Resources Management,
- Return the approved application to the benefits officer for distribution.

Office of Administration and Resources Management's Role

- Approve or disapprove the application based on a final review.
- Return the application to OHR for distribution.

Shared Service Centers' Role

- Verify the employees eligibility.
- Explain the consequences of any outstanding deposits or redeposits.
- Provide retirement estimates.
 - phased retiree - explanation of benefits
 - fully retired - explanation of benefits
- Process phased retirement application.
- Process full retirement application at the end of the agreement.
- Collaborate with the benefits officer to ensure new agreements are sent to phasedret@opm.gov within 15 days of the current agreement expiration date
- Responsible filing agreement and applications in eOPF

Recap of Application Process

- 1) Employee seeks counseling from retirement counselor
- 2) Employee completes the applications
- 3) Employee submits application to first level supervisor
- 4) First level supervisor discusses the application with the employee and makes a recommendation, then submits the application to the second level supervisor
- 5) Second level supervisor concurs or not concur and submits application to DAA/DRA
- 6) DAA/DRA reviews the application and approves or disapproves and sends to the benefits officer
- 7) Benefits officer assigns a control number to ALL applications
- 8) Employee is notified immediately if application is disapproved
- 9) Approved applications are reviewed and sent to OHR
- 10) OHR reviews the package for regulatory compliance and sends it to OARM for final approval
- 11) OARM makes final decision and returns the package to OHR, OHR then returns it to the benefits officer and
- 12) The benefits officer notifies the employee, sends the approved package overnight, notifies the supervisor and the SSC
- 13) The SSC processes the applications

Resources

- **EPA Intranet -**
http://intranet.epa.gov/ohr/benefits/retire/phased_retirement.htm
- **EPA Phased Retirement Order -**
http://intranet.epa.gov/ohr/benefits/retire/phased_retirement-order.pdf
- **Phased Retirement Program Application –**
<http://basin.epa.gov/oas/internalAdmForms.nsf/ByFormNumber?SearchView&Query=3100&SearchWV=TRUE>
- **Phased Retirement Agreement -**
<http://intranet.epa.gov/ohr/benefits/retire/appendix-b-phased-retirement-service-agreement.pdf>
- **Phased Employment/Phased Retirement Status Elections -**
https://www.opm.gov/forms/pdf_fill/sf3116.pdf
- **Benefits Counselors -**
<http://intranet.epa.gov/ohr/benefits/benefitscoordinators.htm>
- **Online Retirement Package -**
http://intranet.epa.gov/ohr/benefits/retire/online_retirement_package.htm
- **FedHR Navigator -**
<https://fhrnavigator.com/frbweb/logon.do?operation=index&client=EPA&redir=0>

Message

From: Torrez, Alfredo [Torrez.Alfredo@epa.gov]
Sent: 11/21/2017 8:48:31 PM
To: Stevens, Robert [Stevens.Robert@epa.gov]; Erickson, Amber [Erickson.Amber@epa.gov]
Subject: RE: Agenda Items from 11/21/17 OW Management Council discussion

Ex. 5 - Deliberative Process

Alfredo Torrez, Associate Director and
OW Program Management Official
Management and Operations Staff
Office of Water, Office of the Assistant Administrator
U.S. Environmental Protection Agency
Room 3311C WJC East (4101M)
Phone: (202) 564-6621 Mobile: Ex. 6 - Personal Privacy
Fax: (202) 564-0500
Email: torrez.alfredo@epa.gov

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From: Stevens, Robert
Sent: Tuesday, November 21, 2017 2:45 PM
To: Torrez, Alfredo <Torrez.Alfredo@epa.gov>; Erickson, Amber <Erickson.Amber@epa.gov>
Subject: FW: Agenda Items from 11/21/17 OW Management Council discussion

FYI – **Ex. 5 - Deliberative Process**

Ex. 5 - Deliberative Process

Robert Stevens, Director
Management and Operations Staff
Office of Water, Office of the Assistant Administrator
US EPA (4101M), EPA East Room 3311A
Washington, DC 20460
(202) 564-5703
(202) 564-0500 (FAX)
stevens.robert@epa.gov

In an effort to evaluate customer satisfaction, MOS would appreciate your taking a few moments to provide feedback to the [MOS Feedback](#) email box. Your time and effort are greatly appreciated.

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From: Christensen, Christina
Sent: Tuesday, November 21, 2017 1:20 PM
To: Chancey, Barbara <Chancey.Barbara@epa.gov>; Ortiz, Agnes <Ortiz.Agnes@epa.gov>; Gilbertson, Sue <gilbertson.sue@epa.gov>; Bissonette, Eric <Bissonette.Eric@epa.gov>; Lousberg, Macara <Lousberg.Macara@epa.gov>; Stevens, Robert <Stevens.Robert@epa.gov>; Spraul, Greg <Spraul.Greg@epa.gov>
Cc: McLain, Jennifer <McLain.Jennifer@epa.gov>; Klos, Caroline <Klos.caroline@epa.gov>
Subject: Agenda Items from 11/21/17 OW Management Council discussion

Good afternoon OW staff directors,

As part of the OW Management Council's commitment to keeping Staff Directors better informed of MC agenda items, below is a list of the specific agenda items discussed at today's MC meeting, and a short description of the outcomes.

If you have any questions, please contact your Deputy Office Director. Thank you!

OW Management Council Agenda Items and Outcomes: November 21, 2017

1. OW Workforce Planning

Ex. 5 - Deliberative Process

2. New 508 Compliance Regs

Ex. 5 - Deliberative Process

3. Laptop Refresh

Ex. 5 - Deliberative Process

Christina Christensen
U.S. EPA, Office of Water
Office of Science & Technology
Standards & Health Protection Division
(202) 566-0537

Message

From: Torrez, Alfredo [Torrez.Alfredo@epa.gov]
Sent: 9/6/2017 3:09:02 PM
To: Erickson, Amber [Erickson.Amber@epa.gov]
Subject: RE: process for funding VERA VSIP - additional guidance

Can you confirm that all actions were processed yesterday?

Thanks,

Alfredo Torrez, Associate Director and
OW Program Management Official
Management and Operations Staff
Office of Water, Office of the Assistant Administrator
U.S. Environmental Protection Agency
Room 3311C WJC East (4101M)
Phone: (202) 564-6621 Mobile: Ex. 5 - Deliberative Process
Fax: (202) 564-0500
Email: torrez.alfredo@epa.gov

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From: Woods, Terry
Sent: Wednesday, September 06, 2017 11:02 AM
To: Torrez, Alfredo <Torrez.Alfredo@epa.gov>
Cc: Stevens, Robert <Stevens.Robert@epa.gov>; Lopez-Alvarado, Melinda <Lopez-Alvarado.Melinda@epa.gov>; Erickson, Amber <Erickson.Amber@epa.gov>; Fontaine, Tim <Fontaine.Tim@epa.gov>; Keyton, Lori <Keyton.Lori@epa.gov>
Subject: RE: process for funding VERA VSIP - additional guidance

Hey Alfredo....

Do you know if this is the final list? Did all of these get completed in the HR System? Can you let me know? Thanks!

..•'`•.><(((('••'`•.><(((('••'`•.><(((('••'`•.

Terry Woods
Office of Water
Resource Management Staff
202-564-0326

From: Torrez, Alfredo
Sent: Tuesday, September 05, 2017 3:21 PM
To: Woods, Terry <Woods.Terry@epa.gov>
Cc: Stevens, Robert <Stevens.Robert@epa.gov>; Lopez-Alvarado, Melinda <Lopez-Alvarado.Melinda@epa.gov>; Erickson, Amber <Erickson.Amber@epa.gov>; Fontaine, Tim <Fontaine.Tim@epa.gov>
Subject: RE: process for funding VERA VSIP - additional guidance

Terry,

Requested information is below. The only actions we know have been completed in the HR system are Ex. 6 - Personal Privacy and the rest are pending with Vegas. Our understanding is that all actions will be completed today.

Ex. 6 - Personal Privacy

Name	Action Type Desc	Date Eff	Office	Org
<div>Ex. 6 - Personal Privacy</div>				

Alfredo Torrez, Associate Director and
OW Program Management Official
Management and Operations Staff
Office of Water, Office of the Assistant Administrator
U.S. Environmental Protection Agency
Room 3311C WJC East (4101M)
Phone: (202) 564-6621 Mobile: Ex. 5 - Deliberative Process
Fax: (202) 564-0500
Email: torrez.alfredo@epa.gov

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From: Woods, Terry
Sent: Tuesday, September 05, 2017 12:57 PM
To: Torrez, Alfredo <Torrez.Alfredo@epa.gov>
Cc: Stevens, Robert <Stevens.Robert@epa.gov>; Lopez-Alvarado, Melinda <Lopez-Alvarado.Melinda@epa.gov>; Erickson, Amber <Erickson.Amber@epa.gov>; Fontaine, Tim <Fontaine.Tim@epa.gov>
Subject: RE: process for funding VERA VSIP - additional guidance

OK, Great. Thank you!

.,.'^.,.><(((^>.,.'^.,.><(((^>.,.'^.,.><(((^>.,.'^.,.

Terry Woods
Office of Water
Resource Management Staff
202-564-0326

From: Torrez, Alfredo
Sent: Tuesday, September 05, 2017 12:19 PM
To: Woods, Terry <Woods.Terry@epa.gov>
Cc: Stevens, Robert <Stevens.Robert@epa.gov>; Lopez-Alvarado, Melinda <Lopez-Alvarado.Melinda@epa.gov>; Erickson, Amber <Erickson.Amber@epa.gov>; Fontaine, Tim <Fontaine.Tim@epa.gov>
Subject: RE: process for funding VERA VSIP - additional guidance

We're checking the HR system and with Vegas to make sure we know who left and the effective date of their separation (and to make sure their separation was input into the system). We should be able to respond by mid-afternoon.

Alfredo Torrez, Associate Director and
OW Program Management Official
Management and Operations Staff
Office of Water, Office of the Assistant Administrator
U.S. Environmental Protection Agency
Room 3311C WJC East (4101M)
Phone: (202) 564-6621 Mobile: Ex. 5 - Deliberative Process
Fax: (202) 564-0500
Email: torrez.alfredo@epa.gov

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From: Woods, Terry
Sent: Tuesday, September 05, 2017 11:22 AM
To: Torrez, Alfredo <Torrez.Alfredo@epa.gov>
Cc: Stevens, Robert <Stevens.Robert@epa.gov>; Lopez-Alvarado, Melinda <Lopez-Alvarado.Melinda@epa.gov>; Erickson, Amber <Erickson.Amber@epa.gov>; Fontaine, Tim <Fontaine.Tim@epa.gov>
Subject: FW: process for funding VERA VSIP - additional guidance
Importance: High

Hi MOS.....

Can you please provide me with the FINAL list, by Office, of the OW staff who took the VERA/VSIP?

Ex. 5 - Deliberative Process thank you!

Ex. 5 - Deliberative Process

.,.'`.,.'><(((('0> .,.'`.,.'><(((('0>.,.'`.,.'><(((('0>.,.'`.,.'

Terry Woods
Office of Water
Resource Management Staff
202-564-0326

From: Fontaine, Tim
Sent: Tuesday, September 05, 2017 8:23 AM
To: Woods, Terry <Woods.Terry@epa.gov>

Cc: King, RyanM <King.RyanM@epa.gov>; Giddings, Daniel <giddings.daniel@epa.gov>; Spraul, Greg <Spraul.Greg@epa.gov>; Torrez, Alfredo <Torrez.Alfredo@epa.gov>; OW Budget Officers <OW_Budget_Officers@epa.gov>

Subject: FW: process for funding VERA VSIP - additional guidance

Importance: High

Terry,

Please set up a budget officers meeting to discuss this guidance and the Supplemental.

Tim Fontaine
EPA Office of Water
(202) 564-0318

From: Terris, Carol

Sent: Friday, September 01, 2017 1:11 PM

To: OCFO-SBO <OCFOSBO@epa.gov>; OCFO-Regional-Comptroller <OCFORegionalComptroller@epa.gov>

Cc: Baden, Beth <Baden.Beth@epa.gov>; Volin, Phyllis <Volin.Phyllis@epa.gov>; Williams, Maria <Williams.Maria@epa.gov>; Remmers, Janet <Remmers.Janet@epa.gov>

Subject: process for funding VERA VSIP - additional guidance

Importance: High

Hi everyone,

The Office of Budget has completed the transfer of funds to your accounts for the agency VSIP payments. We have attached a spreadsheet showing the "To" lines for the VSIP reprogrammings. The spreadsheet contains a tab for each appropriation. I am pleased to say that in almost every case we could provide funds for these needs. Thanks to those offices that worked with us where there were specific issues. Due to Congressional limitations, we were unable to provide funds for the Geographic Programs. Also attached is a listing of the NOA transfers.

Please note the following:

1. The VSIP payment to each departing employee will be made in the same pay period as the effective date of retirement. Annual Leave payouts will be made two pay periods after the effective date of retirement.
2. These funds are primarily carryover funds, though a few offices received new EPM authority. If you received carryover funds, you will need to make the adjustments for the VSIP payments during the CPARS process. For those who are departing during the current pay period (August 20 – September 2), the **window for you to make your CPARS adjustments is from September 8 through September 13.**
3. If you have fewer people taking the VERA/VSIP than estimated and now have excess **NOA** payroll funds, please use the excess funds for the Annual Leave payouts. If that is not practical, please contact us and we will work with you to arrange another use. You must obtain OB approval prior to using NOA funds for a purpose other than the Annual Leave payout.
4. If you have fewer people taking the VERA/VSIP than estimated and now have excess **expiring** payroll funds, please use any excess funds for payroll corrections. Given the timeframes involved that is the best option to utilize those funds and will preserve some flexibility in NOA. To the extent possible, please use your excess expiring funds to make CPARS adjustments to payroll charges for staff in your office who did take the payouts. You can begin making these adjustments immediately, adjusting

charges to prior pay periods. We ask that you complete the adjustment process as soon as possible. We will be tracking the carryover to ensure the agency avoids any unintended lapse. The NOA payroll that is made available should be used to cover the annual leave adjustments once those payouts are processed.

5. Please do not leave the expiring funds in place, as we do not want to risk losing these funds. If you are having any difficulty spending these funds, please contact us as soon as possible.

Please let us know if you have any questions.

And a sincere thanks to you and your staffs for all the work and collaboration to come to a successful result!

Message

From: Torrez, Alfredo [Torrez.Alfredo@epa.gov]
Sent: 11/17/2017 10:18:24 PM
To: Stevens, Robert [Stevens.Robert@epa.gov]; Erickson, Amber [Erickson.Amber@epa.gov]
Subject: Rough Draft of Hiring Strategy
Attachments: Approved Actions 11-17-17.xlsx; Managing our FTE - process rev.docx; OW ATTRITION DATA BASED ON MOS ROSTER TRACKING.docx; Managing FTE Levels Templatefinal draft.docx; Strategy for Managing OW FY18 FTE Levels v2.docx; RE: FTE Questions on VM

Providing what I have so far for our meeting with RMS on Monday. The document (Strategy for Managing OW FY18 FTE Levels v2) includes notes and questions that we need to ask and answer to develop a clear draft to present to Benita and the Program Offices. I also attached the different data documents that were provided by Amber and RMS, and revised agency guidance, so that we have them all in one email.

Alfredo Torrez, Associate Director and
OW Program Management Official
Management and Operations Staff
Office of Water, Office of the Assistant Administrator
U.S. Environmental Protection Agency
Room 3311C WJC East (4101M)
Phone: (202) 564-6621 Mobile: Ex. 5 - Deliberative Process
Fax: (202) 564-0500
Email: torrez.alfredo@epa.gov

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Message

From: Torrez, Alfredo [Torrez.Alfredo@epa.gov]
Sent: 11/17/2017 9:10:43 PM
To: Giddings, Daniel [giddings.daniel@epa.gov]
CC: Fontaine, Tim [Fontaine.Tim@epa.gov]; Spraul, Greg [Spraul.Greg@epa.gov]; Woods, Terry [Woods.Terry@epa.gov]; King, RyanM [King.RyanM@epa.gov]; Erickson, Amber [Erickson.Amber@epa.gov]; Stevens, Robert [Stevens.Robert@epa.gov]
Subject: RE: FTE Questions on VM

Got it - thanks

Alfredo Torrez, Associate Director and
OW Program Management Official
Management and Operations Staff
Office of Water, Office of the Assistant Administrator
U.S. Environmental Protection Agency
Room 3311C WJC East (4101M)
Phone: (202) 564-6621 Mobile: Ex. 6 - Personal Privacy
Fax: (202) 564-0500
Email: torrez.alfredo@epa.gov

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From: Giddings, Daniel
Sent: Friday, November 17, 2017 3:14 PM
To: Torrez, Alfredo <Torrez.Alfredo@epa.gov>
Cc: Fontaine, Tim <Fontaine.Tim@epa.gov>; Spraul, Greg <Spraul.Greg@epa.gov>; Woods, Terry <Woods.Terry@epa.gov>; King, RyanM <King.RyanM@epa.gov>; Erickson, Amber <Erickson.Amber@epa.gov>; Stevens, Robert <Stevens.Robert@epa.gov>
Subject: RE: FTE Questions on VM

Alfredo,

My understanding is that we have a FY 2018 EOY target of Pre V/V we are at With our FTE savings from 2017 V/V we are at Therefore we have FTE more to go by the end of FY 2018 to get to

The purpose of Monday's meeting is to confirm this understanding with everyone, as we have several different data sources.

Best,

Danny Giddings
Resource Management Staff
Office of Water
U.S. Environmental Protection Agency
(202)-564-0320

From: Torrez, Alfredo
Sent: Friday, November 17, 2017 3:04 PM
To: Giddings, Daniel <giddings.daniel@epa.gov>

Cc: Fontaine, Tim <Fontaine.Tim@epa.gov>; Spraul, Greg <Spraul.Greg@epa.gov>; Woods, Terry <Woods.Terry@epa.gov>; King, RyanM <King.RyanM@epa.gov>; Erickson, Amber <Erickson.Amber@epa.gov>; Stevens, Robert <Stevens.Robert@epa.gov>
Subject: RE: FTE Questions on VM

Thanks Danny. So to make sure I understand, our reduced FTE target is 09/30/18?

Ex. 5 - Deliberative Process

and we need to reach it by

Alfredo Torrez, Associate Director and
OW Program Management Official
Management and Operations Staff
Office of Water, Office of the Assistant Administrator
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Phone: (202) 564-6621 Mobile: Ex. 6 - Personal Privacy
Fax: (202) 564-0500
Email: torrez.alfredo@epa.gov

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From: Giddings, Daniel
Sent: Friday, November 17, 2017 1:08 PM
To: Torrez, Alfredo <Torrez.Alfredo@epa.gov>
Cc: Fontaine, Tim <Fontaine.Tim@epa.gov>; Spraul, Greg <Spraul.Greg@epa.gov>; Woods, Terry <Woods.Terry@epa.gov>; King, RyanM <King.RyanM@epa.gov>; Erickson, Amber <Erickson.Amber@epa.gov>
Subject: FTE Questions on VM

Hi Alfredo,

Got your voicemail. These are good questions to raise at the meeting on Monday

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

See you Monday!

Best,

Danny Giddings
Resource Management Staff
Office of Water
U.S. Environmental Protection Agency
(202)-564-0320

Message

From: Torrez, Alfredo [Torrez.Alfredo@epa.gov]
Sent: 2/11/2017 8:36:04 PM
To: Erickson, Amber [Erickson.Amber@epa.gov]; Stevens, Robert [Stevens.Robert@epa.gov]
Subject: FW: OIG VERA-VSIP Report
Attachments: OIG Draft Report -- EPA's 2014 Early-Out and Buyout Activities Aided Workforce Restructuring, But Not All Goals Have Been Achieved.pdf; VERA-VSIP-Final Report-01-26-17.docx

Importance: High

We need to let Benita and Mike know about the report on Monday, if not during a one-on-one conversation, then during the IO Directors weekly meeting.

Amber - Do you think we can have a response to Debbi by cob Tuesday?

Alfredo Torrez, Associate Director and
OW Program Management Official
Management and Operations Staff
Office of Water, Office of the Assistant Administrator
U.S. Environmental Protection Agency
Room 3311C WJC East (4101M)
Phone: (202) 564-6621 Mobile: Ex. 6 - Personal Privacy
Fax: (202) 564-0500
Email: torrez.alfredo@epa.gov

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From: Hart, Debbi
Sent: Friday, February 10, 2017 1:22 PM
To: Schwartz, Barbara <Schwartz.Barbara@epa.gov>; Bailey, Rhonda <Bailey.Rhonda@epa.gov>; Torrez, Alfredo <Torrez.Alfredo@epa.gov>; Stevens, Robert <Stevens.Robert@epa.gov>; Milton, Laura <Milton.Laura@epa.gov>
Cc: Kuhns, Jason <Kuhns.Jason@epa.gov>; Parker, Gary <parker.gary@epa.gov>; Carpenter, Wesley <Carpenter.Wesley@epa.gov>
Subject: FW: OIG VERA-VSIP Report
Importance: High

Greetings!

Please see the attached and message below. It sounds like the OIG ran into a few bumps trying to finalize this report. As a result, they are reporting final hiring numbers from the May 2016 timeframe. I asked Tim if we could update them for the final report and he is open to that. Can you please take a look at the latest report, particularly Table 4 on page 11 and let me know at your earliest if you have updates on the number of VERA/VSIP vacated positions that are now filled in your respective office? You can also let me know if you have any other edits or updates to the report that should be included. Thank you—contact me with any questions. Debbi

Debbi Hart
Director
Policy, Planning & Training Division
OHR, OARM
USEPA
202.564.2011
hart.debbi@epa.gov

From: Roach, Tim
Sent: Friday, January 27, 2017 9:21 AM
To: Hart, Debbi <Hart.Debbi@epa.gov>
Cc: Lewis, Eric <Lewis.Eric@epa.gov>; Beeson, Benjamin W. <Beeson.Benjamin@epa.gov>; Carter, Leon <Carter.Leon@epa.gov>
Subject: OIG VERA-VSIP Report

Hello Debbie

We completed our edits and I attached the revised VERA-VSIP report, along with the draft from last Spring. The report's undergone some significant editing since you last reviewed it, due to internal decisions about how to report the results of a review of our own organization. We decided against incorporating those findings into this report and will issue a separate report about the OIG's implementation of its buyout authority. I'll send you a copy of that once it is issued.

Please review this version and share it with the offices and regions that would like to see it one more time. Please note that some of the differences between the two reports are due to comments we received about the draft. If you have questions about the content or want to submit comments, please let me know as soon as possible. We're performing our quality assurance steps now and that will continue for the next few weeks. I'll keep you informed about that process.

Thanks once again for your time and patience with this process. While we've been delayed issuing the final, we've always felt it is important to report about the agency's progress achieving restructuring goals and how those were aided by the buyout authority. Sharing this experience via our report informs EPA, other agencies, and the public about the impact of buyouts and subsequent restructuring activities that help the agency better carry out its mission.

Sincerely,

Tim R
312-886-3026

Message

From: Torrez, Alfredo [Torrez.Alfredo@epa.gov]
Sent: 5/19/2017 8:12:26 PM
To: Erickson, Amber [Erickson.Amber@epa.gov]
Subject: Questions Regarding V/V Budget
Attachments: Office of Water VERA and VSIP Justification draft 05-19-17.docx

I highlighted areas where you and I came up with different numbers. Not sure if I'm not doing the calculations the right or the same way you did. I added the budget numbers to the justification so you'll need to scroll to pages 3 – 4.

Alfredo Torrez, Associate Director and
OW Program Management Official
Management and Operations Staff
Office of Water, Office of the Assistant Administrator
U.S. Environmental Protection Agency
Room 3311C WJC East (4101M)
Phone: (202) 564-6621 Mobile: Ex. 6 - Personal Privacy
Fax: (202) 564-0500
Email: torrez.alfredo@epa.gov

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Message

From: Torrez, Alfredo [Torrez.Alfredo@epa.gov]
Sent: 4/12/2017 1:43:31 PM
To: Stevens, Robert [Stevens.Robert@epa.gov]; Erickson, Amber [Erickson.Amber@epa.gov]
Subject: FW: VERA/VSIP

Below is the link to the OMB memo. You can also see OECA has had at least one internal discussion regarding V/V.

Alfredo Torrez, Associate Director and
OW Program Management Official
Management and Operations Staff
Office of Water, Office of the Assistant Administrator
U.S. Environmental Protection Agency
Room 3311C WJC East (4101M)
Phone: (202) 564-6621 Mobile: Ex. 6 - Personal Privacy
Fax: (202) 564-0500
Email: torrez.alfredo@epa.gov

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-----Original Message-----

From: Braxton, Marilyn
Sent: Wednesday, April 12, 2017 8:40 AM
To: Lesperance, Twanna <Lesperance.Twanna@epa.gov>; Milton, Laura <Milton.Laura@epa.gov>
Cc: Monroe, Scott <Monroe.Scott@epa.gov>; Cunningham, Dennis <Cunningham.Dennis@epa.gov>; Graf, Kate <Graf.Kate@epa.gov>; Jablonski, Janice <jablonski.janice@epa.gov>; Martinez, Gwendolyn <Martinez.Gwendolyn@epa.gov>; Smith, Susan <Smith.Susan@epa.gov>; Vaughan, Pat <Vaughan.Pat@epa.gov>; Kutzke, Julie <Kutzke.Julie@epa.gov>; Torrez, Alfredo <Torrez.Alfredo@epa.gov>; Soward, Ruth-Alene <Soward.Ruth-Alene@epa.gov>
Subject: RE: VERA/VSIP

FYI, in case you hadn't seen this yet, here the link to OMB's "Comprehensive Plan for Reforming the Federal Government and Reducing the Federal Civilian Workforce" (M-17-22) that was released today.

<https://www.whitehouse.gov/sites/whitehouse.gov/files/omb/memoranda/2017/M-17-22.pdf>

Regards!

Marilyn A. Braxton
202-564-8192
Ex. 6 - Personal Privacy (mobile)

Website: OEI's HR Corner

-----Original Message-----

From: Lesperance, Twanna
Sent: Monday, April 10, 2017 9:38 AM
To: Milton, Laura <Milton.Laura@epa.gov>
Cc: Monroe, Scott <Monroe.Scott@epa.gov>; Braxton, Marilyn <Braxton.Marilyn@epa.gov>; Cunningham, Dennis <Cunningham.Dennis@epa.gov>; Graf, Kate <Graf.Kate@epa.gov>; Jablonski, Janice <jablonski.janice@epa.gov>; Martinez, Gwendolyn <Martinez.Gwendolyn@epa.gov>; Smith, Susan <Smith.Susan@epa.gov>; Vaughan, Pat <Vaughan.Pat@epa.gov>; Kutzke, Julie <Kutzke.Julie@epa.gov>; Torrez, Alfredo <Torrez.Alfredo@epa.gov>; Soward, Ruth-Alene <Soward.Ruth-Alene@epa.gov>
Subject: Re: VERA/VSIP

Thanks Laura. I'm interested in whatever seems to be progressing in this area and if I hear anything I will share with you as well.

Respectfully,

Twanna Lesperance, Assistant Director, PMO AO, OAES, Administrative Management Staff
202-564-0419

ED_001372E_00019997-00001

> On Apr 10, 2017, at 8:58 AM, Milton, Laura <Milton.Laura@epa.gov> wrote:
>
> FYI, I shared with my SRO the following language re VERA/VSIP from the OPM guides which seems to allow for agency-wide buyouts, very clearly so for VERA (if there ever is an inclination/budget to do so). I believe we are going to try to pursue this at sr. leadership levels.
>
> VERA
> Reasons why the agency needs VERA;
>
> In its reasons for requesting VERA, the agency must include a detailed summary of the agency's personnel and/or budgetary situation that will result in an excess of personnel because of a substantial delayering, reorganization, reduction in force, transfer of function, or other workforce restructuring or reshaping. Also, the agency's reasons for VERA must be consistent with its human capital goals.
>
> If the agency requests agencywide VERA, the agency must summarize how its plans for organizational change will affect all its employees and components. However, the overall summary to OPM in support of agencywide VERA does not have to identify each location, organization, or group of employees that would be covered by the VERA.
>
> After OPM approves an agency's request to offer VERA agencywide, the agency has the right to restrict coverage of the authority. OPM's approval letter to the agency covers the agency's right to manage its VERA.
>
> For example, with an agencywide VERA the agency may offer early retirement to all its employees. At its option, the agency may limit VERA offers to employees on the basis of location, organizational unit, occupational series, grade, and/or any similar nonpersonal and objective factor. The agency may also offer VERA during a single window period, or during multiple window periods.
>
> VSIP
> The Voluntary Separation Incentive Payment (VSIP or buyout) Authority allows agencies to offer lump-sum payments to employees who are in surplus positions or have skills that are no longer needed in the workforce, as an incentive to separate. Under VSIP, agencies may pay up to \$25,000, or an amount equal to the amount of severance pay an employee would be entitled to receive, whichever is less. Employees may separate to accept VSIP by resignation, optional retirement, or by voluntary early retirement, if authorized.
>
> VSIPs are an option for increasing voluntary attrition in agencies that are downsizing or restructuring. Besides providing an incentive for employees to voluntarily retire or resign to avoid potential reduction in force actions, the agency may also offer VSIP to employees in safe positions that could then provide placement opportunities for employees holding surplus positions.
>
> In its request to the Office of Personnel Management (OPM) for VSIP approval, the agency should clearly outline how VSIP would assist the agency in reaching its restructuring or downsizing goals. At all stages of developing an individual VSIP plan or a combined VSIP/VERA (Voluntary Early Retirement Authority) plan, the agency must always consider whether a sudden increase in attrition will compromise the agency's:
> (1)Ability to effectively carry out its mission; and/or, (2)Available
> fiscal resources.
>
>
>
> Laura Milton, PMO
> Administrative Management Division
> OECA/Office of Administration and Policy US Environmental Protection
> Agency
> Phone: 202-564-6017
> milton.laura@epa.gov
>
>

Message

From: Chancey, Barbara [Chancey.Barbara@epa.gov]
Sent: 5/23/2017 7:33:18 PM
To: Erickson, Amber [Erickson.Amber@epa.gov]
Subject: FW: Final Drafts of OW V/V Documents
Attachments: Office of Water VERA and VSIP Justification with Budget Final Draft 05-23-17.docx; OW V-V Attachment 1 Final 05-22-17.docx; OW Org Charts for V-V request 05-24-17 Attachment 2 Final.pptx; OW Targeted Positions Template Attachment 3 05-23-17.xlsx; OW V-V Attachment 4 Final 05-22-17.docx

Barbara A. Chancey, Director
Policy, Communications & Resource Management
Office of Wetlands, Oceans & Watersheds
U.S. Environmental Protection Agency
1200 Pennsylvania Ave NW (4501-T)
Room 7136-A, EPA-West
(O) 202-566-0332
(C) [Ex. 6 - Personal Privacy](#)

From: Torrez, Alfredo
Sent: Tuesday, May 23, 2017 2:56 PM
To: Best-Wong, Benita <Best-Wong.Benita@epa.gov>; OW Staff Directors <OW_Staff_Directors@epa.gov>
Cc: Stevens, Robert <Stevens.Robert@epa.gov>; Fontaine, Tim <Fontaine.Tim@epa.gov>; Christensen, Christina <Christensen.Christina@epa.gov>
Subject: Final Drafts of OW V/V Documents

Attached are the final drafts of the VERA/VSIP package, including:

- Two-page narrative justification with budget information

Ex. 5 - Deliberative Process

- Attachment 1 – Targeted positions and maximum number of VSIPs

Ex. 5 - Deliberative Process

- Attachment 2 – Org chart after VERA/VSIP

Ex. 5 - Deliberative Process

- Attachment 3 – Target positions template

Ex. 5 - Deliberative Process

- Attachment 4 – Projected cost savings

Ex. 5 - Deliberative Process

The final package is due to OHR this Wednesday, so please provide final edits and comments by noon tomorrow.

Alfredo Torrez, Associate Director and
OW Program Management Official
Management and Operations Staff

Office of Water, Office of the Assistant Administrator
U.S. Environmental Protection Agency
Room 3311C WJC East (4101M)
Phone: (202) 564-6621 Mobile: Ex. 6 - Personal Privacy
Fax: (202) 564-0500
Email: torrez.alfredo@epa.gov

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Message

From: Erickson, Amber [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=0A17F4DD509A48089DD7455C70DAAE25-ERICKSON, AMBER]
Sent: 5/18/2017 5:23:34 PM
To: Torrez, Alfredo [Torrez.Alfredo@epa.gov]
Subject: VV- Attachment 4 + Payroll
Attachments: OW V-V Business Case Budget Information 5.18.17.docx; Attachment 4 2017.docx

Hopefully it's right. Note that Att 4 doesn't account for benefits but the budget info does.

Amber Erickson | Senior Human Capital Analyst | Management & Operations Staff / Office of the Assistant Administrator / Office of Water / US EPA | 202.566.2984

Projected Savings from FY2018 – FY2019

Projected Departures thru VERA-VSIP

	FY18	FY19
Ex. 5 - Deliberative Process		
Savings Total =	Ex. 5 - Deliberative Process	

Projected Recruits following VERA-VSIP

	FY18	FY19
Ex. 5 - Deliberative Process		
New Hires Total =	Ex. 5 - Deliberative Process	

Total Savings =	Ex. 5 - Deliberative Process
-----------------	-------------------------------------

Note:

Projections presume that two-thirds of the individuals accepting the V-V offers (departures) would have received a step promotion one time within the 2 years and it presumes the hires (recruits) following the V-V offers would have remained in grade for 12 months with a promotion in grade on their anniversary date. These salary projections do not include an increase for benefits.

Message

From: Erickson, Amber [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=0A17F4DD509A48089DD7455C70DAAE25-ERICKSON, AMBER]
Sent: 4/18/2017 6:29:37 PM
To: 'Amber Erickson' [Ex. 6 - Personal Privacy]
CC: Erickson, Amber [Erickson.Amber@epa.gov]
Subject: print
Attachments: OW Targeted Positions Template .xlsx; Guiding Questions WFP revApril2017.docx; V-V Business Case Checklist April2017final.docx; VV ExampleThemeJustificationsApril2017.docx; vsip_guide.pdf; EPA VERA-VSIP OW with OPM Approval Letter.pdf; OW VERA and VSIP Request 12-20-13 Final.pdf; OW Strategic Hiring Template 7.19.16.xlsx

Amber Erickson | Senior Human Capital Analyst | Management & Operations Staff / Office of the Assistant Administrator / Office of Water / US EPA | 202.566.2984

Message

From: Erickson, Amber [Erickson.Amber@epa.gov]
Sent: 2/17/2017 8:53:27 PM
To: Lopez-Alvarado, Melinda [Lopez-Alvarado.Melinda@epa.gov]
Subject: Fwd: OIG VERA-VSIP Report
Attachments: OW Strategic Hiring Template 2.14.17.xlsx; ATT00001.htm; MEMORANDUM.docx; ATT00002.htm

Amber Erickson | Senior Human Capital Analyst | Management & Operations Staff / Office of the Assistant Administrator / Office of Water / US EPA | 202.566.2984

Begin forwarded message:

From: "Erickson, Amber" <Erickson.Amber@epa.gov>
Date: February 16, 2017 at 4:07:01 PM EST
To: "Torrez, Alfredo" <Torrez.Alfredo@epa.gov>
Subject: FW: OIG VERA-VSIP Report

Feel free to edit as you like. I can put it in front of Benita or Mike tomorrow if they're in

Amber Erickson | Senior Human Capital Analyst | Management & Operations Staff / Office of the Assistant Administrator / Office of Water / US EPA | 202.566.2984

From: Erickson, Amber
Sent: Wednesday, February 15, 2017 12:30 PM
To: Torrez, Alfredo <Torrez.Alfredo@epa.gov>
Subject: RE: OIG VERA-VSIP Report

With final numbers. Updated spreadsheet attached (I only updated the WW Departed Tab).

Thank you for the opportunity to update the Office of Water's (OW) numbers in *Table 4: Progress on restructuring through new positions*. We have provided our updated information below, but would also like to note that the progress represented in restructuring positions correlates with progress toward each of the other identified goals, requiring a more well-rounded progress update. While the Office of Inspector General's (OIG) report was an accurate depiction of OW's progress in October of 2015, OW has made significant progress since then.

Ex. 5 - Deliberative Process

Specifically for *Table 4: Progress on restructuring through new positions* on page 11:

Region/office	Positions available for restructuring	Positions restructured and filled
Office of Water	Ex. 5 - Deliberative Process	

Our updated numbers are as follows for the [] positions OW identified for restructuring:

-
-
-
-

Ex. 5 - Deliberative Process

Also

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Specifically for Table 4: Progress on restructuring through new positions on page 11:

Region/office	Positions available for restructuring	Positions restructured and filled
Office of Water	Ex. 5 - Deliberative Process	

Our updated numbers are as follows for the 26 positions OW identified for restructuring:

Ex. 5 - Deliberative Process

Thank you for the opportunity to respond to this draft report.

Amber Erickson | Senior Human Capital Analyst | Management & Operations Staff / Office of the Assistant Administrator
/ Office of Water / US EPA | 202.566.2984

From: Torrez, Alfredo

Sent: Monday, February 13, 2017 9:06 AM

To: Stevens, Robert <Stevens.Robert@epa.gov>; Erickson, Amber <Erickson.Amber@epa.gov>

Subject: RE: OIG VERA-VSIP Report

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Alfredo Torrez, Associate Director and
OW Program Management Official
Management and Operations Staff
Office of Water, Office of the Assistant Administrator
U.S. Environmental Protection Agency
Room 3311C WJC East (4101M)
Phone: (202) 564-6621 Mobile: Ex. 6 - Personal Privacy
Fax: (202) 564-0500
Email: torrez.alfredo@epa.gov

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From: Stevens, Robert
Sent: Monday, February 13, 2017 8:38 AM
To: Torrez, Alfredo <Torrez.Alfredo@epa.gov>; Erickson, Amber <Erickson.Amber@epa.gov>
Subject: RE: OIG VERA-VSIP Report

Ex. 5 - Deliberative Process

Robert Stevens, Director
Management and Operations Staff
Office of Water, Office of the Assistant Administrator
US EPA (4101M), EPA East Room 3311A
Washington, DC 20460
(202) 564-5703
(202) 564-0500 (FAX)
stevens.robert@epa.gov

In an effort to evaluate customer satisfaction, MOS would appreciate your taking a few moments to provide feedback to the [MOS Feedback](#) email box. Your time and effort are greatly appreciated.

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From: Torrez, Alfredo
Sent: Saturday, February 11, 2017 3:36 PM
To: Erickson, Amber <Erickson.Amber@epa.gov>; Stevens, Robert <Stevens.Robert@epa.gov>
Subject: FW: OIG VERA-VSIP Report
Importance: High

We need to let Benita and Mike know about the report on Monday, if not during a one-on-one conversation, then during the IO Directors weekly meeting.

Amber - Do you think we can have a response to Debby by cob Tuesday?

Alfredo Torrez, Associate Director and
OW Program Management Official
Management and Operations Staff
Office of Water, Office of the Assistant Administrator
U.S. Environmental Protection Agency
Room 3311C WJC East (4101M)
Phone: (202) 564-6621 Mobile: Ex. 6 - Personal Privacy
Fax: (202) 564-0500
Email: torrez.alfredo@epa.gov

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From: Hart, Debbi
Sent: Friday, February 10, 2017 1:22 PM
To: Schwartz, Barbara <Schwartz.Barbara@epa.gov>; Bailey, Rhonda <Bailey.Rhonda@epa.gov>; Torrez, Alfredo <Torrez.Alfredo@epa.gov>; Stevens, Robert <Stevens.Robert@epa.gov>; Milton, Laura <Milton.Laura@epa.gov>
Cc: Kuhns, Jason <Kuhns.Jason@epa.gov>; Parker, Gary <parker.gary@epa.gov>; Carpenter, Wesley <Carpenter.Wesley@epa.gov>
Subject: FW: OIG VERA-VSIP Report
Importance: High

Greetings!

Please see the attached and message below. It sounds like the OIG ran into a few bumps trying to finalize this report. As a result, they are reporting final hiring numbers from the May 2016 timeframe. I asked Tim if we could update them for the final report and he is open to that. Can you please take a look at the latest report, particularly Table 4 on page 11 and let me know at your earliest if you have updates on the number of VERA/VSIP vacated positions that are now filled in your respective office? You can also let me know if you have any other edits or updates to the report that should be included. Thank you—contact me with any questions. Debbi

Debbi Hart
Director
Policy, Planning & Training Division
OHR, OARM
USEPA
202.564.2011
hart.debbi@epa.gov

From: Roach, Tim
Sent: Friday, January 27, 2017 9:21 AM
To: Hart, Debbi <Hart.Debbi@epa.gov>
Cc: Lewis, Eric <Lewis.Eric@epa.gov>; Beeson, Benjamin W. <Beeson.Benjamin@epa.gov>; Carter, Leon <Carter.Leon@epa.gov>
Subject: OIG VERA-VSIP Report

Hello Debbie

We completed our edits and I attached the revised VERA-VSIP report, along with the draft from last Spring. The report's undergone some significant editing since you last reviewed it, due to internal decisions about how to report the results of a review of our own organization. We decided against incorporating those findings into this report and will issue a separate report about the OIG's implementation of its buyout authority. I'll send you a copy of that once it is issued.

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Thanks once again for your time and patience with this process. While we've been delayed issuing the final, we've always felt it is important to report about the agency's progress achieving restructuring goals and how those were aided by the buyout authority. Sharing this experience via our report informs EPA, other agencies, and the public about the impact of buyouts and subsequent restructuring activities that help the agency better carry out its mission.

Sincerely,

Tim R
312-886-3026

Message

From: Vizian, Donna [Vizian.Donna@epa.gov]
Sent: 12/11/2017 1:43:03 PM
To: Flynn, Mike [Flynn.Mike@epa.gov]; Bloom, David [Bloom.David@epa.gov]; Darwin, Henry [darwin.henry@epa.gov]; Kaplan, Robert [kaplan.robert@epa.gov]; Orme-Zavaleta, Jennifer [Orme-Zavaleta.Jennifer@epa.gov]
Subject: RE: FTE management Board
Attachments: Region 10.docx; AO.docx; OW.docx

R10, AO and OW attached. OAR and OGC remain.

From: Vizian, Donna
Sent: Friday, December 08, 2017 4:00 PM
To: Flynn, Mike <Flynn.Mike@epa.gov>; Bloom, David <Bloom.David@epa.gov>; Darwin, Henry <darwin.henry@epa.gov>; Kaplan, Robert <kaplan.robert@epa.gov>; Orme-Zavaleta, Jennifer <Orme-Zavaleta.Jennifer@epa.gov>
Subject: FTE management Board

Hi Everyone,

I am attaching the plans I have received so far. Henry, Mike and David – we are delivering hard copies. I am missing AO, OAR, OGC, OW, R6 and R10. I will forward these as I receive them.

Enjoy the weekend.

Donna

Message

From: Vizian, Donna [Vizian.Donna@epa.gov]
Sent: 12/8/2017 8:59:56 PM
To: Flynn, Mike [Flynn.Mike@epa.gov]; Bloom, David [Bloom.David@epa.gov]; Darwin, Henry [darwin.henry@epa.gov]; Kaplan, Robert [kaplan.robert@epa.gov]; Orme-Zavaleta, Jennifer [Orme-Zavaleta.Jennifer@epa.gov]
Subject: FTE management Board
Attachments: OARM 120517.docx; OCFO.docx; OCSPP OPP 50 FTE Fee Funded Hires.xlsx; OCSPP.docx; OECA 12-6-17.docx; OEI.docx; OITA.docx; OLEM.docx; ORD December 6 2017.docx; Region 1.docx; Region 2.docx; Region 3.docx; Region 4.docx; Region 5.docx; Region 7.docx; Region 8.docx; Region 9.docx

Hi Everyone,

I am attaching the plans I have received so far. Henry, Mike and David – we are delivering hard copies. I am missing AO, OAR, OGC, OW, R6 and R10. I will forward these as I receive them.

Enjoy the weekend.

Donna

Message

From: Vizian, Donna [Vizian.Donna@epa.gov]
Sent: 9/7/2017 6:06:26 PM
To: Bloom, David [Bloom.David@epa.gov]; Kenny, Shannon [Kenny.Shannon@epa.gov]; Greaves, Holly [greaves.holly@epa.gov]; Brown, Byron [brown.byron@epa.gov]; Pirzadeh, Michelle [Pirzadeh.Michelle@epa.gov]; Flynn, Mike [Flynn.Mike@epa.gov]; Fine, Steven [fine.steven@epa.gov]; Hitchens, Lynnann [hitchens.lynnann@epa.gov]; Bell, Matthew [Bell.Matthew@epa.gov]; Darwin, Henry [darwin.henry@epa.gov]
Subject: Workforce Plan
Attachments: Workforce Actions ver1 9 7 17.docx

Lynnann and I collaborated on a draft. We included attrition information. Not sure it is helpful. Let us know what you think. It is short. Any comments before noon tomorrow would be appreciated. thanks

Message

From: Bloom, David [Bloom.David@epa.gov]
Sent: 11/15/2017 1:58:59 PM
To: Vizian, Donna [Vizian.Donna@epa.gov]; Flynn, Mike [Flynn.Mike@epa.gov]
CC: Showman, John [Showman.John@epa.gov]
Subject: RE: revised template
Attachments: Managing FTE Levels Template revdbcomments.docx

All,
Please see proposed edits. David

From: Vizian, Donna
Sent: Tuesday, November 14, 2017 7:25 PM
To: Flynn, Mike <Flynn.Mike@epa.gov>; Bloom, David <Bloom.David@epa.gov>
Cc: Showman, John <Showman.John@epa.gov>
Subject: revised template

I added some language to the template based on our discussion today.

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Anything else?

Ex. 5 - Deliberative Process

Message

From: Hull, George [Hull.George@epa.gov]
Sent: 6/20/2017 3:43:36 PM
To: Flynn, Mike [Flynn.Mike@epa.gov]
Subject: RE: VERA/VSIP Message

O.k. We will send out. Sarah is just addressing one grammatical typo with Donna. It shouldn't hold it up. Aiming to send out at 2:00 pm. - George

From: Flynn, Mike
Sent: Tuesday, June 20, 2017 11:34 AM
To: Hull, George <Hull.George@epa.gov>
Cc: Sowell, Sarah <Sowell.Sarah@epa.gov>; Reeder, John <Reeder.John@epa.gov>; Vizian, Donna <Vizian.Donna@epa.gov>
Subject: RE: VERA/VSIP Message

George,

Ex. 5 - Deliberative Process

*Mike Flynn
Acting Deputy Administrator
U.S. Environmental Protection Agency
202-564-4711*

From: Hull, George
Sent: Tuesday, June 20, 2017 11:25 AM
To: Flynn, Mike <Flynn.Mike@epa.gov>
Cc: Sowell, Sarah <Sowell.Sarah@epa.gov>; Reeder, John <Reeder.John@epa.gov>
Subject: VERA/VSIP Message

Mike,

Ex. 5 - Deliberative Process

From: Sowell, Sarah
Sent: Tuesday, June 20, 2017 10:35 AM
To: Hull, George <Hull.George@epa.gov>
Subject: VERA/VSIP -- What is the new information we're trying to communicate?

PROPOSED VERA/VSIP MESSAGE TO BE SENT OUT TODAY (DRAFT):

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

JUNE 1 VERA/VSIP MASS MAILER FROM MIKE

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

*Sarah N. Sowell, Director, Office of Internal Communications
Office of Public Affairs
U.S. Environmental Protection Agency / OPA/OIC
William Jefferson Clinton Bldg/North, Room 2502-L / MC 1701-A
1200 Pennsylvania Avenue, NW
Washington, DC 20460*

Tel: 202-564-0145 // Cell: Ex. 6 - Personal Privacy

Message

From: Vizian, Donna [Vizian.Donna@epa.gov]
Sent: 1/3/2018 10:42:07 PM
To: Flynn, Mike [Flynn.Mike@epa.gov]; Darwin, Henry [darwin.henry@epa.gov]; Bloom, David [Bloom.David@epa.gov]; Orme-Zavaleta, Jennifer [Orme-Zavaleta.Jennifer@epa.gov]; Pirzadeh, Michelle [Pirzadeh.Michelle@epa.gov]; Newton, Cheryl [Newton.Cheryl@epa.gov]
Subject: FTE Board Meeting
Attachments: RE: Interim FTE Level Strategy - Region 4 Submission; RE: OW Interim Staffing Strategy; Re: Region 3 FY2018 Interim FTE Strategy; FW: Administrator's Office Strategic Hiring ; RE: Strategy for Managing FTE levels; Managing FTE Levels Templatefinal-Region 2.docx; FTE Management Strategy R9 Revised.docx

Hi Everyone – In preparation for our meeting tomorrow, I am resending the responses I received to our questions and my quick analysis. Looking forward to our discussion tomorrow.

Ex. 5 - Deliberative Process

Message

From: Bohan, Suzanne [bohan.suzanne@epa.gov]
Sent: 5/24/2017 7:03:59 PM
To: Fowler, Joshua [Fowler.Joshua@epa.gov]; Thomas, Deb [thomas.debrah@epa.gov]
CC: Buhl, Rick [Buhl.Rick@epa.gov]; Kortuem, Patrice [Kortuem.Patrice@epa.gov]; Bielenberg, Ben [Bielenberg.Ben@epa.gov]; Vuong, Stephanie [Vuong.Stephanie@epa.gov]
Subject: RE: Final? Version of the VERA/VSIP Package
Attachments: vera vsip business case. v6. sjb.may 24 2017.docx

I have a few edits on the business case document. Please see attached and let me know if you have any questions. I did only a cursory review of the two attached tables. They looked fine, but another set of eyes should review before sending.

Josh – After making the remaining changes, please send or coordinate with the VV team to appoint a sender in your absence.

Thanks,

Suzanne

From: Fowler, Joshua
Sent: Wednesday, May 24, 2017 11:25 AM
To: Thomas, Deb <thomas.debrah@epa.gov>; Bohan, Suzanne <bohan.suzanne@epa.gov>
Cc: Buhl, Rick <Buhl.Rick@epa.gov>; Kortuem, Patrice <Kortuem.Patrice@epa.gov>; Bielenberg, Ben <Bielenberg.Ben@epa.gov>; Vuong, Stephanie <Vuong.Stephanie@epa.gov>
Subject: Final? Version of the VERA/VSIP Package

Hi Deb and Suzanne,

We have put together a revised version of the V/V package based on the requirements posted by HQ. Please let us know if you would like us to submit this to HQ or if there are changes you would like made or questions that you have.

Thanks

Josh Fowler
Human Resources Officer
EPA Region 8
1595 Wynkoop St. Denver, CO 80212
fowler.joshua@epa.gov
303-312-6348 (work)

Ex. 6 - Personal Privacy

 (cell)

Message

From: Bielenberg, Ben [Bielenberg.Ben@epa.gov]
Sent: 5/24/2017 4:55:37 PM
To: Fowler, Joshua [Fowler.Joshua@epa.gov]
Subject: vera vsip business case. v6. may 15 2017.docx
Attachments: vera vsip business case. v6. may 15 2017.docx

Message

From: Greenwald, Beth [Greenwald.Beth@epa.gov]
Sent: 5/16/2017 5:27:27 PM
To: Bielenberg, Ben [Bielenberg.Ben@epa.gov]; Fowler, Joshua [Fowler.Joshua@epa.gov]
Subject: VV info
Attachments: Targeted Positions Template - Region 8 for HQ.xlsx; VERA VSIP Major Themes - Region 8.xlsx; VV Cost and Savings Estimates Region 8.xlsx; V-V Business Case Checklist May 2017 R8.docx

Hi, guys –

Attached are the following files:

- 1) Targeted positions template – Ex. 5 - Deliberative Process
Ex. 5 - Deliberative Process
- 2) VERA VSIP Major Themes – Ex. 5 - Deliberative Process
- 3) VV Cost and Savings Estimates Region 8 – Ex. 5 - Deliberative Process
Ex. 5 - Deliberative Process
- 4) V-V Business Case Checklist May 2017 Region 8 – this is a similar version of #3, in MS Word form. I wasn't sure which one was the correct form (#3 or #4), so I filled out both. Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Let me know if you have questions, or if things change. Thanks!

Beth

Message

From: Kortuem, Patrice [Kortuem.Patrice@epa.gov]
Sent: 5/3/2017 7:33:05 PM
To: Bohan, Suzanne [bohan.suzanne@epa.gov]; Bielenberg, Ben [Bielenberg.Ben@epa.gov]; Fowler, Joshua [Fowler.Joshua@epa.gov]; Vuong, Stephanie [Vuong.Stephanie@epa.gov]
CC: Buhl, Rick [Buhl.Rick@epa.gov]
Subject: Fw: OECA VERA/VSIP narrative (OARM 5/5 deliverable)
Attachments: OECA VERA VSIP 5-3-17.docx

Patrice Kortuem | Deputy Assistant Regional Administrator | Office of Technical & Management Services USEPA Region 8 | 1595 Wynkoop Street (8TMS) | Denver CO 80202-1129 | [303-312-6150](tel:303-312-6150)

From: Brincks, Mike
Sent: Wednesday, May 3, 2017 1:10 PM
To: ARA; Deputy ARAs
Cc: Westenberger, Andrea
Subject: FW: OECA VERA/VSIP narrative (OARM 5/5 deliverable)

FYI – the latest draft from OECA – new target:

Ex. 5 - Deliberative Process



Mike Brincks

Assistant Regional Administrator
Office of Policy & Management
US Environmental Protection Agency, Region 7
11201 Renner Boulevard
Lenexa, KS 66219
Office: 913-551-7799
brincks.mike@epa.gov

From: Badalamente, Mark
Sent: Wednesday, May 03, 2017 1:59 PM
To: OECA Office Directors and Deputy Directors <OECA_Office_Directors_and_Deputy_Directors@epa.gov>; Starfield, Lawrence <Starfield.Lawrence@epa.gov>; Cozad, David <Cozad.David@epa.gov>; Miles, Erin <Miles.Erin@epa.gov>; Chu, Ed <Chu.Ed@epa.gov>; Brincks, Mike <brincks.mike@epa.gov>; Gargas, Toni <Gargas.Toni@epa.gov>; LaBoda, Sarah <LaBoda.Sarah@epa.gov>
Cc: Milton, Laura <Milton.Laura@epa.gov>
Subject: FW: OECA VERA/VSIP narrative (OARM 5/5 deliverable)

Thanks for the comments on the initial draft. I'm attaching a revised version (OECA VERA VSIP 5-3-17) that reflects comments received, and

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process This one page narrative is due to OCFO on Friday, so please give me any final comments as soon as possible.

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Thanks!

From: Badalamente, Mark

Sent: Friday, April 28, 2017 8:17 AM

To: OECA Office Directors and Deputy Directors <OECA.Office.Directors.and.Deputy.Directors@epa.gov>; Starfield, Lawrence <Starfield.Lawrence@epa.gov>; Cozad, David <Cozad.David@epa.gov>; Miles, Erin <Miles.Erin@epa.gov>; Chu, Ed <Chu.Ed@epa.gov>; Brincks, Mike <brincks.mike@epa.gov>; Gargas, Toni <Gargas.Toni@epa.gov>; LaBoda, Sarah <LaBoda.Sarah@epa.gov>

Cc: Milton, Laura <Milton.Laura@epa.gov>

Subject: OECA VERA/VSIP narrative (OARM 5/5 deliverable)

Thanks for the input and discussion on the initial draft of OECA's "themes" VERA/VSIP document. This version reflects that input, and I am now sharing it for a final review before we submit it to OARM next Friday. Please do not share this broadly or distribute to staff. Please send comments and questions to me or Laura Milton.

Mark Badalamente

Acting Deputy Assistant Administrator for Management

Senior Resource Official (SRO)

Senior Information Official (SIO)

Office of Enforcement and Compliance Assurance

US Environmental Protection Agency

William Jefferson Clinton Building

Room 3235 South

Office: 202-564-4673

Mobile:

Ex. 6 - Personal Privacy

Message

From: Logan, Paul [Logan.Paul@epa.gov]
Sent: 5/12/2017 10:19:59 PM
To: Bohan, Suzanne [bohan.suzanne@epa.gov]; Fowler, Joshua [Fowler.Joshua@epa.gov]
CC: Opekar, Kimberly [Opekar.Kimberly@epa.gov]; Chalfant, Mark [Chalfant.Mark@epa.gov]; Schefski, Kenneth [Schefski.Kenneth@epa.gov]; Sutin, Elyana [Sutin.Elyana@epa.gov]; Bielenberg, Ben [Bielenberg.Ben@epa.gov]
Subject: RE: V/V Business Case Ready for Review
Attachments: vera vsip business case.sjb. may 12 2017.docx

Thanks Suzanne. I agree wholeheartedly with all your comments, including those focused on attorneys and paralegals. I added some comments to that effect.

KC will want to weigh in too – let's hear from him on Monday.

Paul Logan

Deputy Regional Counsel | EPA Region 8
303.312.6854 | logan.paul@epa.gov

From: Bohan, Suzanne
Sent: Friday, May 12, 2017 3:04 PM
To: Fowler, Joshua <Fowler.Joshua@epa.gov>; Bielenberg, Ben <Bielenberg.Ben@epa.gov>
Cc: Opekar, Kimberly <Opekar.Kimberly@epa.gov>; Chalfant, Mark <Chalfant.Mark@epa.gov>; Schefski, Kenneth <Schefski.Kenneth@epa.gov>; Logan, Paul <Logan.Paul@epa.gov>
Subject: RE: V/V Business Case Ready for Review

Josh and Ben

My initial comments on the VV business case are attached. I'm copying ECEJ and ORC senior leadership because several of my comments relate to legal staff – attorneys and paralegals.

Thanks,
Suzanne

From: Fowler, Joshua
Sent: Friday, May 12, 2017 12:24 PM
To: Buhl, Rick <Buhl.Rick@epa.gov>; Bielenberg, Ben <Bielenberg.Ben@epa.gov>; Garcia, Bert <Garcia.Bert@epa.gov>; Opekar, Kimberly <Opekar.Kimberly@epa.gov>; Schefski, Kenneth <Schefski.Kenneth@epa.gov>; Bohan, Suzanne <bohan.suzanne@epa.gov>; Kortuem, Patrice <Kortuem.Patrice@epa.gov>; Logan, Paul <Logan.Paul@epa.gov>; O'Connor, Darcy <oconnor.darcy@epa.gov>; Stavnes, Sandra <Stavnes.Sandra@epa.gov>; Thomas, Deb <thomas.debrah@epa.gov>; Daly, Carl <Daly.Carl@epa.gov>; Mutter, Andrew <mutter.andrew@epa.gov>; Jenkins, Laura Flynn <Jenkins.Laura@epa.gov>; Smidinger, Betsy <Smidinger.Betsy@epa.gov>; Chalfant, Mark <Chalfant.Mark@epa.gov>; Hestmark, Martin <Hestmark.Martin@epa.gov>
Subject: V/V Business Case Ready for Review

RMC Members,

The draft V/V business case is for your review has been posted on the [RMC SharePoint site](#). Please do not share beyond your management teams. This document is a draft and we expect that there will be changes as you have time to deliberate and consult with your management teams. Please note that the document provided is not the full V/V package, which will be completed following Tuesday's RMC meeting. Please provide any comments or changes that you may have to myself and Ben prior to RMC on Tuesday.

Thank you

Josh Fowler
Acting Human Resources Officer
EPA Region 8
1595 Wynkoop St. Denver, CO 80212
fowler.joshua@epa.gov
303-312-6348 (work)

Ex. 6 - Personal Privacy

(cell)

Message

From: Bielenberg, Ben [Bielenberg.Ben@epa.gov]
Sent: 4/28/2017 8:22:08 PM
To: Fowler, Joshua [Fowler.Joshua@epa.gov]
Subject: FW: VERA VSIP OARM OCFO initial proposals 20170427.docx
Attachments: VERA VSIP OARM OCFO initial proposals 20170427.docx

From: Kortuem, Patrice
Sent: Thursday, April 27, 2017 9:59 AM
To: Bielenberg, Ben <Bielenberg.Ben@epa.gov>; Vuong, Stephanie <Vuong.Stephanie@epa.gov>
Subject: VERA VSIP OARM OCFO initial proposals 20170427.docx

OCFO and OARM have not yet provided their written submissions. This information was provided by R10 in their LRC capacity. I will share the formal submission when/if I receive it.

Thank you,
Patrice

Message

From: Bielenberg, Ben [Bielenberg.Ben@epa.gov]
Sent: 10/23/2017 5:53:11 PM
To: Buhl, Rick [Buhl.Rick@epa.gov]
CC: Kortuem, Patrice [Kortuem.Patrice@epa.gov]; Fowler, Joshua [Fowler.Joshua@epa.gov]; Poetter, Joe [poetter.joe@epa.gov]
Subject: FY18 Interim FTE Level - R8 Input.docx
Attachments: FY18 Interim FTE Level - R8 Input.docx

Importance: High

Rick,

I've updated the briefing paper to include the extramural funds comment and tried to address Suzanne's point about

Ex. 5 - Deliberative Process

Let me know how else we can help.

BB

Message

From: Thomas, Deb [thomas.debrah@epa.gov]
Sent: 4/28/2017 2:22:24 PM
To: Bohan, Suzanne [bohan.suzanne@epa.gov]; Buhl, Rick [Buhl.Rick@epa.gov]; Bielenberg, Ben [Bielenberg.Ben@epa.gov]; Vuong, Stephanie [Vuong.Stephanie@epa.gov]; Kortuem, Patrice [Kortuem.Patrice@epa.gov]; Fowler, Joshua [Fowler.Joshua@epa.gov]
Subject: Fwd: For Your Review: DRAFT OLEM Straw Proposal - RCRA Program Efficiencies Only.
Attachments: DRAFT FINAL 4-27-2017 OLEM NPM RCRA Straw Proposal.docx; ATT00001.htm

Begin forwarded message:

From: "Szaro, Deb" <Szaro.Deb@epa.gov>
Date: April 28, 2017 at 6:55:07 AM MDT
To: 2017Regionfirstassistants <2017Regionfirstassistants@epa.gov>
Subject: FW: For Your Review: DRAFT OLEM Straw Proposal - RCRA Program Efficiencies Only.

fyi

From: Simon, Nigel
Sent: Thursday, April 27, 2017 6:23 PM
To: Szaro, Deb <Szaro.Deb@epa.gov>; Norcross, Jeffrey <Norcross.Jeffrey@epa.gov>; Johnson, Barnes <Johnson.Barnes@epa.gov>; Olson, Bryan <Olson.Bryan@epa.gov>; Barmakian, Nancy <Barmakian.Nancy@epa.gov>; Nicholas, David <Nicholas.David@epa.gov>; Salyer, Kathleen <Salyer.Kathleen@epa.gov>
Cc: Moraff, Kenneth <Moraff.Ken@epa.gov>; Kenyon, Michael <Kenyon.Michael@epa.gov>
Subject: For Your Review: DRAFT OLEM Straw Proposal - RCRA Program Efficiencies Only.

Hi All:

Attached for your quick review is the attached straw proposal for RCRA program efficiencies as part of the ongoing V/V discussions. Thank you all for your careful and thoughtful analysis in pulling together this straw proposal. A special thank you goes to Jeff Norcross and David Nicholas for capturing and summarizing notes, comments and edits from the RCRA DDs meeting.

A few items to note:

- <!--[if !supportLists]--><!--[endif]-->The attached only includes RCRA. The SuperFund section is still in the deliberative process with the SF DDs. We will take a deeper dive on that next week at the SF DDs meeting in Dallas.
- <!--[if !supportLists]--><!--[endif]-->As Deb mentioned earlier, each region will submit its own business case using OLEM NPM language.
- <!--[if !supportLists]--><!--[endif]-->I'm not sure if it will fly but there is no mention of elimination of program specific areas so our approach moving forward will be to reduce or streamline activities and functions.

Jeff – please feel free to circulate to the RCRA DDs as a final look over.
Deb – please also feel free to circulate among the First Assistants as well.

Please get back to me with any comments or edits before COB Monday, May 1.

Thanks All,

Nigel

Message

From: Bielenberg, Ben [Bielenberg.Ben@epa.gov]
Sent: 4/18/2017 7:00:40 PM
To: Fowler, Joshua [Fowler.Joshua@epa.gov]; Kortuem, Patrice [Kortuem.Patrice@epa.gov]
Subject: Talking Points Workforce Reshapng.docx
Attachments: Talking Points Workforce Reshapng.docx

Importance: High

Best I could do while allowing time for review.

Message

From: Bohan, Suzanne [bohan.suzanne@epa.gov]
Sent: 8/16/2017 12:35:32 AM
To: R8 RLT [R8_RLT@epa.gov]
Subject: VERA/VSIP Talking Points
Attachments: VV talking points. Region 8 Aug 14 2017.pdf

RLT –

Attached are talking points for your use in discussions with staff regarding EPA's VERA/VSIP. The talking points include background on the Agency's process, including information on EPA's past VERA/VSIPs. Much of this information has previously been shared with staff. New information contained in these talking points includes Region 8's VERA/VSIP offers and acceptances. We have not received information regarding EPA-wide VERA/VSIP numbers.

Thanks in advance for communicating this information to staff.

Suzanne

Suzanne J. Bohan

Acting Deputy Regional Administrator | U.S. EPA, Region 8

Work: 303.312.6925 | Fax: 303-312-6882 | Bohan.suzanne@epa.gov

R8 Talking Points for RLT Discussions with Staff

VERA/VSIP

August 14, 2017

- The Acting Deputy Administrator had asked all program and regional offices to review their resources and all 22 regions and program offices submitted plans to the office of Human Resources in the Office of Administration and Resources Management. In developing the VERA/VSIP business case, the agency considered multiple factors including:
 - increasing staff to supervisor ratio;
 - consolidating and streamlining programs and functions;
 - restructuring or reducing highly graded supervisory and non-supervisory positions;
 - focusing on core business functions, programmatic and STEM priorities
- The OHR analyzed these plans and prepared one consolidated agency plan.
- The agency used the selection criteria below in the 2014 and 2015 VERA/VSIPs
 - In the event of more applicants than positions being offered. However, note that these criteria are subject to bargaining with the unions: If the number of applications received exceeds the total number of VSIPs the agency can offer, approvals will be based first on the service computation date used to calculate an employee's leave, then on the entry on duty date for the EPA years of service. If these dates are the same for two EPA eligible employees, then the offer will be granted to the employee who submitted his or her application first.
- All employees who are taking a VERA/VSIP must be separated from the agency by September 2, 2017. It is critical that separations occur in September, since the Agency has funds set aside this fiscal year.
- EPA submitted its draft plan to OPM and OMB on 16 June 2017.
- The agency received approval from OPM and OMB to offer VERA and VSIP on July 10.
- Region 8 had 48 positions identified and would accept a maximum of 8 V/V departures.
- The Region made a very deliberate decision to have a small V/V:
 - First, at this time and with what we know (FY17 budget), we need you doing the important work that you do every day.
 - Second, we want to manage the uncertainty around individual program funding in FY18 and beyond, as we are required to eliminate or significantly restructure any position that is vacated as a result of the V/V. Additionally, as noted above, we were not to use proposed FY18 funding as a basis for eliminating positions.
 - Finally, given our projected attrition rates, we feel we will have some FTE headroom should FY18 budgets be reduced below FY17 levels.
- Region 8 made 2 V/V offers. Both individuals accepted. Their positions cannot be refilled as per the requirements of VERA/VSIP. Departures will need to take place by Sept. 2nd.

- We will not be opening up the VERA/VSIP to other individuals at this time. OPM and OMB require us to adhere in the language in our business case. Any changes would require approval from the Agency, OMB and OPM. The Region is not working on any new VERA/VSIP packages or revisions to the current one.
- The Agency's decision to apply for and offer VERA/VSIPs was not made lightly. Senior management and others throughout the agency have spent a considerable amount of time looking strategically at ways to better align the agency's workforce with agency goals not only for today, but most importantly, for the future.
- Offering VERA/VSIPs is just one component of a much larger effort to improve the way we work and hopefully improve the workplace experience for our employees.

Message

From: Greenwald, Beth [Greenwald.Beth@epa.gov]
Sent: 7/3/2017 6:15:42 PM
To: Remmers, Janet [Remmers.Janet@epa.gov]
CC: Fowler, Joshua [Fowler.Joshua@epa.gov]; Bielenberg, Ben [Bielenberg.Ben@epa.gov]; Poetter, Joe [poetter.joe@epa.gov]
Subject: RE: Region 8's updated V/V numbers
Attachments: v and v budget information tables v3 for HQ July 3 2017 R8.docx

Ok – here is the update.

Thanks - Beth

From: Remmers, Janet
Sent: Monday, July 3, 2017 12:12 PM
To: Greenwald, Beth <Greenwald.Beth@epa.gov>
Cc: Fowler, Joshua <Fowler.Joshua@epa.gov>; Bielenberg, Ben <Bielenberg.Ben@epa.gov>; Poetter, Joe <poetter.joe@epa.gov>
Subject: RE: Region 8's updated V/V numbers

Please revise Rows A and D to make FY2018 and FY2019 columns the same number. We are not including inflation factors.

Table B – Estimated Savings for FY 2018 through FY 2019		
	FY 2018 Estimate	FY 2019 Estimate
<h1>Ex. 5 - Deliberative Process</h1>		

Janet Remmers, Ph.D.
RPROS
Office of Budget/OCFO
Mail code: 2732A
office: 202-564-0548
aws: 301-593-7870

From: Greenwald, Beth

Sent: Monday, July 03, 2017 2:07 PM

To: Remmers, Janet <Remmers.Janet@epa.gov>; Terris, Carol <Terris.Carol@epa.gov>

Cc: Fowler, Joshua <Fowler.Joshua@epa.gov>; Bielenberg, Ben <Bielenberg.Ben@epa.gov>; Poetter, Joe <poetter.joe@epa.gov>

Subject: Region 8's updated V/V numbers

Hi, Carol and Janet – attached is Region 8's updated chart for the VERA/VSIP package.

Please let me know if you have questions (I'm in the office for a couple more hours), or you can contact Joe Poetter (303-312-6186) on Wednesday, July 5th, or Ben Bielenberg (303-312-6771) on July 6th.

Thanks! ☺

Beth

Message

From: Mutter, Andrew [mutter.andrew@epa.gov]
Sent: 8/11/2017 2:24:35 PM
To: Fowler, Joshua [Fowler.Joshua@epa.gov]
CC: Kortuem, Patrice [Kortuem.Patrice@epa.gov]
Subject: RE: VERA/VSIP Talking Points
Attachments: VV talking points 11 Aug 17.docx

Josh,
I added a little for historical purposes. Pls review.

Best regards,

Andrew

Andrew Mutter

Director, Office of Communication and Public Involvement
U.S. Environmental Protection Agency, Region 8 (Denver, CO)

Office: 303.312.6448

Cell: Ex. 6 - Personal Privacy

Twitter: [@EPARegion8](#)

Facebook: [U.S. EPA Region 8](#)

Webpage: [EPA Region 8 \(Mountains and Plains\)](#)

From: Fowler, Joshua
Sent: Thursday, August 10, 2017 2:19 PM
To: Mutter, Andrew <mutter.andrew@epa.gov>
Cc: Kortuem, Patrice <Kortuem.Patrice@epa.gov>
Subject: VERA/VSIP Talking Points

Hi Andrew,

Deb and Suzanne requested us to work with you to craft some talking points for SLT and RLT to use in explaining the outcome of the VERA/VSIP. I have drafted some points and am hoping that you or a member of your team can review them and provide comments.

Thanks,

Josh Fowler
Human Resources Officer
EPA Region 8
1595 Wynkoop St. Denver, CO 80212
fowler.joshua@epa.gov
303-312-6348 (work)
Ex. 6 - Personal Privacy (cell)

Message

From: Buhl, Rick [Buhl.Rick@epa.gov]
Sent: 12/8/2017 7:02:54 PM
To: Vizian, Donna [Vizian.Donna@epa.gov]
CC: Showman, John [Showman.John@epa.gov]; Bielenberg, Ben [Bielenberg.Ben@epa.gov]; Thomas, Deb [thomas.debrah@epa.gov]; Kortuem, Patrice [Kortuem.Patrice@epa.gov]; Fowler, Joshua [Fowler.Joshua@epa.gov]
Subject: R8 Interim FTE Plan
Attachments: R8_Managing FTE Levels Template_12.8.17 V2.docx

Donna,

I hope all is well. Please find attached Region 8's Interim FTE plan. Please let me know if you have any questions or concerns about the Region 8 plan.

Have a great weekend.

Thanks.

Rick

Message

From: Fowler, Joshua [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=D307DB04D0C340C9A6F1B6925967BC00-FOWLER, JOS]
Sent: 8/8/2017 6:20:00 PM
To: Katherin Hall (hall.katherin@epa.gov) [hall.katherin@epa.gov]
CC: Patrice Kortuem (Kortuem.Patrice@epa.gov) [Kortuem.Patrice@epa.gov]
Subject: First Business Case for Review
Attachments: Business Case DARA ECEJ.docx; vera vsip business case july 3 2017 final.docx

Privileged Attorney-Client Discussion.

Hi Katherin,

Here is the first business case for your review. I am just starting to work on the second one. I have also enclosed the original V/V business case.

Josh Fowler
Human Resources Officer
EPA Region 8
1595 Wynkoop St. Denver, CO 80212
fowler.joshua@epa.gov
303-312-6348 (work)

Ex. 6 - Personal Privacy

 (cell)

Message

From: Fowler, Joshua [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=D307DB04D0C340C9A6F1B6925967BC00-FOWLER, JOS]
Sent: 5/24/2017 5:24:36 PM
To: Thomas, Deb [thomas.debrah@epa.gov]; Bohan, Suzanne [bohan.suzanne@epa.gov]
CC: Rick Buhl (Buhl.Rick@epa.gov) [Buhl.Rick@epa.gov]; Patrice Kortuem (Kortuem.Patrice@epa.gov) [Kortuem.Patrice@epa.gov]; Ben Bielenberg (Bielenberg.Ben@epa.gov) [Bielenberg.Ben@epa.gov]; Vuong, Stephanie [Vuong.Stephanie@epa.gov]
Subject: Final? Version of the VERA/VSIP Package
Attachments: vera vsip business case. v6. may 24 2017.docx; Attachment 1 Targeted Positions Template - Region 8 .xlsx; Attachment 2 Current and Proposed Organizational Chart Region 8.pptx

Hi Deb and Suzanne,

We have put together a revised version of the V/V package based on the requirements posted by HQ. Please let us know if you would like us to submit this to HQ or if there are changes you would like made or questions that you have.

Thanks

Josh Fowler
Human Resources Officer
EPA Region 8
1595 Wynkoop St. Denver, CO 80212
fowler.joshua@epa.gov
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Ex. 6 - Personal Privacy

 (cell)

Message

From: Graf, Kate [Graf.Kate@epa.gov]
Sent: 12/6/2017 7:43:26 PM
To: Wise, Louise [Wise.Louise@epa.gov]
CC: Morales, Oscar [Morales.Oscar@epa.gov]; Scott, Gregory [Scott.Gregory@epa.gov]
Subject: FW: OCSPP FY 2018 Interim FTE Ceiling Strategy
Attachments: Managing FTE Levels Template_OCSPP_12-04-17.docx; OPP 50 FTE breakout.xlsx

Louise,

I made a few edits in redline strikeout to the 50 FTE paragraph on the second page. Additionally, the chart in Excel that shows the breakout by Division.

Kate

From: Wise, Louise
Sent: Wednesday, December 06, 2017 10:46 AM
To: Graf, Kate <Graf.Kate@epa.gov>
Subject: FW: OCSPP FY 2018 Interim FTE Ceiling Strategy

Here's the form that we need to submit tomorrow. Can you add in some details about our hiring actions to this? You could list them separately and we could refer to the list as an attachment if that's easier. Whatever works.

From: Scott, Gregory
Sent: Monday, December 04, 2017 2:51 PM
To: Wise, Louise <Wise.Louise@epa.gov>
Cc: Berkley, Bruce <Berkley.Bruce@epa.gov>; Morales, Oscar <Morales.Oscar@epa.gov>
Subject: RE: OCSPP FY 2018 Interim FTE Ceiling Strategy

Hi Louise, I added Arnold's edits to the edits from earlier today in the attached.

I just spoke with Maria Williams in OCFO. She suggested that our strategy be submitted at the DAA level to Donna Vizian and David Bloom. The Office of Budget is not currently involved in the FTE strategies.

Greg

Gregory Scott
Resource Management Staff
Office of Chemical Safety and Pollution Prevention
WJC East 3139E
(202) 564-7897 - Office
Ex. 6 - Personal Privacy Cell

From: Wise, Louise
Sent: Monday, December 4, 2017 2:34 PM
To: Scott, Gregory <Scott.Gregory@epa.gov>; Berkley, Bruce <Berkley.Bruce@epa.gov>; Morales, Oscar <Morales.Oscar@epa.gov>
Subject: FW: OCSPP FY 2018 Interim FTE Ceiling Strategy

Received a very small edit from Arnold. Will you be sending the final version to OCFO?

From: Layne, Arnold
Sent: Monday, December 04, 2017 1:27 PM
To: Wise, Louise <Wise.Louise@epa.gov>
Cc: Keigwin, Richard <Keigwin.Richard@epa.gov>; Layne, Arnold <Layne.Arnold@epa.gov>
Subject: FW: OCSPP FY 2018 Interim FTE Ceiling Strategy

Hi Louise,

Thanks for the conversation. Here are my suggested edits in track changes. Since we are in agreement on how we will handle backfills, I did not put that into the strategy. Thanks. Arnold

Arnold E. Layne
Deputy Director for Management
EPA Chief Customer Experience Officer for OPP
EPA OCSPP Lead for Zika
Office of Pesticide Programs
US Environmental Protection Agency
703-347-8222

"Nobody cares how much you know, until they know you care about them!" Zig Ziglar

From: Scott, Gregory
Sent: Friday, December 01, 2017 12:30 PM
To: Bertrand, Charlotte <Bertrand.Charlotte@epa.gov>; Wise, Louise <Wise.Louise@epa.gov>; Beck, Nancy <Beck.Nancy@epa.gov>; Morris, Jeff <Morris.Jeff@epa.gov>; Hartman, Mark <Hartman.Mark@epa.gov>; Mottley, Tanya <Mottley.Tanya@epa.gov>; Keigwin, Richard <Keigwin.Richard@epa.gov>; Layne, Arnold <Layne.Arnold@epa.gov>; Hughes, Hayley <hughes.hayley@epa.gov>; Barone, Stan <Barone.Stan@epa.gov>; Graves, Inza <Graves.Inza@epa.gov>
Cc: Berkley, Bruce <Berkley.Bruce@epa.gov>; Morales, Oscar <Morales.Oscar@epa.gov>
Subject: OCSPP FY 2018 Interim FTE Ceiling Strategy

Good afternoon,

Attached is the latest version of OCSPP's strategy to meet the FY 2018 Interim FTE Ceiling. This will be discussed during the Senior Leaders meeting on Monday.

Greg

Gregory Scott
Resource Management Staff
Office of Chemical Safety and Pollution Prevention
WJC East 3139E
(202) 564-7897 - Office
Cell

Ex. 6 - Personal Privacy

Message

From: Graf, Kate [Graf.Kate@epa.gov]
Sent: 5/22/2017 8:21:31 PM
To: Berkley, Bruce [Berkley.Bruce@epa.gov]; Morales, Oscar [Morales.Oscar@epa.gov]; Wise, Louise [Wise.Louise@epa.gov]; Cleland-Hamnett, Wendy [Cleland-Hamnett.Wendy@epa.gov]; Morris, Jeff [Morris.Jeff@epa.gov]; Cunningham-HQ, Barbara [Cunningham-HQ.Barbara@epa.gov]; Layne, Arnold [Layne.Arnold@epa.gov]; Keigwin, Richard [Keigwin.Richard@epa.gov]; Graves, Inza [Graves.Inza@epa.gov]; Barone, Stan [Barone.Stan@epa.gov]
CC: Shimkin, Martha [Shimkin.Martha@epa.gov]
Subject: Workforce - please review by COB Tuesday
Attachments: OCSPP Draft V-V Business Case Checklist 5.19.17.docx; OCSPP Targeted Positions Template.xlsx; Draft OCSPP Org Chart.doc

Importance: High

Senior Managers,

Attached are several documents that I need you to closely review for accuracy. Please feel free to make edits but please do them in track changes so I can easily see where the edits are made. If you could shoot to get these back to me by COB tomorrow, I will incorporate all changes Wednesday morning and that will allow Wendy to have one more look at the package.

The VV Business Case Checklist is supposed to be 2 pages and we are about that length now. I only mention that so that you know we have a space constraint. Also, we are waiting on some information for the Budget Information table at the bottom of this document. I will work with Bruce tomorrow to fill that table out and will send it around. Lastly, the excel spreadsheet is quirky. They have it set up so you can only edit certain cells so it makes it difficult to easily add the rows and columns.

Kate

Kate Graf
PMO
Office of Chemical Safety and Pollution Prevention
202/564-0193

Message

From: Morales, Oscar [Morales.Oscar@epa.gov]
Sent: 5/4/2017 7:38:40 PM
To: Graf, Kate [Graf.Kate@epa.gov]
Subject: Fwd: DRAFT Final - OLEM NPM Program Efficiencies Straw Proposal.
Attachments: OLEM NPM Straw Proposal on Program Eff_Ver 2_ dated May 4 2017.docx; ATT00001.htm

Sent from my iPhone

Begin forwarded message:

From: "Simon, Nigel" <Simon.Nigel@epa.gov>
Date: May 4, 2017 at 3:36:58 PM EDT
To: "Wise, Louise" <Wise.Louise@epa.gov>, "Morales, Oscar" <Morales.Oscar@epa.gov>
Subject: **DRAFT Final - OLEM NPM Program Efficiencies Straw Proposal.**

Here's a copy of our draft final. It's still pending final review.

Nigel

Message

From: Graf, Kate [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=92E0594B13094933B34605677DCB5764-KFRASS02]
Sent: 9/15/2017 5:01:59 PM
To: Berkley, Bruce [Berkley.Bruce@epa.gov]; Morales, Oscar [Morales.Oscar@epa.gov]
CC: Carter, Pamela [Carter.Pamela@epa.gov]; Boutureira, Alan [Boutureira.Alan@epa.gov]; Vineski, Steve [Vineski.Steve@epa.gov]
Subject: Monday morning staff - very important.
Importance: High

Below is a bunch of stuff for Monday morning. I'm sending to both of you just so you have it. Please make sure all of this is said because these are things that have come up over and over this past week.

- Donna Vizian sent out a note last week that all hiring exemption forms must be checked against the VERA VSIP plans we submitted to ensure they are in line with the INTENT of the plan. Kate sent out a link to the final submission last week so all of your HR folks have the language. We will be revising the exemption form early this week to include a place for your staff to sign that they have compared against the VERA VSIP and it is consistent with what we said we were going to do, prior to sending to the IO. This includes all non-supervisory GS-15s which was a key piece of our plan. Per Donna's note, this applies to all types of actions, ie, details, permanent, reassignments, etc.
- Related, please remind your managers that the hiring freeze remains in effect. We have been getting a lot of inquiries/push back from frustrated managers. We completely understand they are frustrated but certain activities require approval by the Acting Deputy Administrator before we can proceed and until we get that there is nothing we can do except periodically prompt him. A case must be made to him on the exemption form that the work is critical and that there is no one currently in the Agency who can do this work. This also applies to term 'conversions'. Terms in and of themselves are not eligible for conversion. The only reason terms would be eligible for a 'conversion' is because of their Peace Corps eligibility. However, even with the Peace Corps eligibility it requires Acting DA sign off to proceed so we would need to make a case why no one else in the agency can do this work. It is a high hurdle.
- Mandatory trainings are due Sept. 30th. There are a lot of people who have not yet completed these trainings. Your training coordinators have been reaching out weekly to your employees (with the links to their Skillport plans), and Kate sent a note to all senior managers on Friday with a list of people who have not yet completed them. These came out months ago so there is really no reason that these shouldn't be done by the deadline.

Kate Graf
PMO
Office of Chemical Safety and Pollution Prevention
202/564-0193

Message

From: Graf, Kate [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=92E0594B13094933B34605677DCB5764-KFRASS02]
Sent: 5/23/2017 2:27:47 PM
To: Martha Shimkin (Shimkin.Martha@epa.gov) [Shimkin.Martha@epa.gov]
Subject: org chart
Attachments: OCSPP VSIP VERA Submission (rev 12-13-13).doc

This is the first VV from 2013. See how we did the org chart here. Something like that may work...maybe you could update that?

Kate Graf
PMO
Office of Chemical Safety and Pollution Prevention
202/564-0193